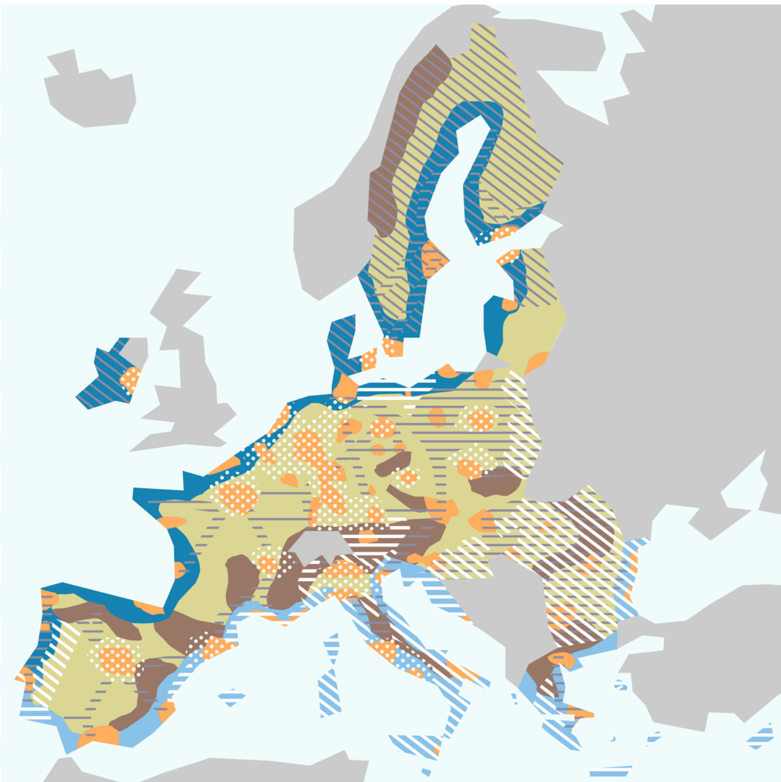
Final Report

Regional impacts of the COVID-19 crisis on the tourist sector

(CCI 2020CE16BAT074)



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August 2021

Regional and Urban Policy

The study

This is the final deliverable of the study on regional impacts of the COVID-19 crisis on the tourist sector (CCI 2020CE16BAT074).

The study assesses how different tourist regions are affected by COVID-19 and potential future developments. The study combines analysis of territorial diversity and the economic importance of tourism (and its prospects) with the territorially diverse impacts of the COVID-19 pandemic as well as policy responses and recovery measures. There is also a time dimension, as the impacts differ territoriality between what we have seen so far (holiday seasons with travel restrictions) and what we expect to see in the short- and medium-term. Based on the impacts of the pandemic and lessons learned from policy responses, policy recommendations have been developed to help tourism regions adapt for the future.

Key words

Tourism, COVID-19, pandemic, regional impacts, Cohesion Policy, tourism trends

The team

The study was led by Spatial Foresight in cooperation with t33, AnySolution and NECSTour as sub-contractors.

Acknowledgements

This study would not have been possible without the many people in the tourism sector and the European Cohesion Policy Community who offered their insights, responding to surveys and participating in interviews and focus groups.

Many thanks also to the members of the Steering Group including colleagues from DG REGIO, DG GROW and JRC and in particular to JRC for making tourism data available.

Without your support this study would not have been possible!

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CCI 2020CE16BAT074

Directorate-General for Regional and Urban Policy

2021

EN

Manuscript completed in August 2021

1st edition

Luxembourg: Publications Office of the European Union, 2021

ISBN 978-92-76-43802-1
doi: 10.2776/179573

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Acronyms

CCIs	Cultural and Creative Industries
CF	Cohesion Fund
CLLD	Community Led Local Development
DMO	Destination Management Organisation
EAFRD	European Agricultural Fund for Rural Development
ERDF	European Regional Development Fund
ESF	European Social Fund
ETIS	European Tourism Indicators System
EU-27	European Union as of 2020 with 27 Member States
EU-28	European Union with 28 Member States (including the UK)
GDP	Gross Domestic Product
GVA	Gross Added Value
ICT	Information and Communication Technology
ILTM	International Luxury Travel Market
ITI	Integrated Territorial Investment
JRC	Joint Research Centre of the European Commission
LGBTQ+	Lesbian, Gay, Bisexual, Transgender, Queer and others
MICE	Meetings, Incentives, Conventions and Exhibitions/Events tourism
NUTS	Nomenclature of Units for Territorial Statistics
RIS3	Research and Innovation Strategies for Smart Specialisation
RRP	Recovery and Resilience Plans
S3	Smart Specialisation Strategies
SME	Small and Medium-sized Enterprise
STD	Smart Tourism Destination
SUD	Sustainable Urban Development
TAIEX	Technical Assistance and Information Exchange
ToT	Tourism of Tomorrow

Abstract – Résumé – Kurzfassung

Tourism is an important part of the European economy involving 3 million enterprises, employing 22.6 million people (11% of total EU employment) and accounting for 9.5% of EU GDP in 2019. It is also one of the sectors mostly heavily affected by COVID-19, both in the short-term and in the medium to long-term. The impacts are felt throughout complex tourism ecosystems and value chains across a wide range of sectors.

The study assesses how different tourist regions are affected by COVID-19 and potential future developments. It combines analysis of territorial diversity and the economic importance of tourism with the territorially diverse impacts of the COVID-19 pandemic. There is also a time dimension, as the impacts differ territoriality between what we have seen so far and what we can expect to in the short- and medium-term.

To support recovery towards more resilient and green tourism all levels, from local to European, must cooperate. The crisis must be used to develop new solutions for sustainable tourism and embrace digitisation as a tool. All this needs to be done in multi-level governance processes involving a wide range of players from many different sectors and levels of governance.

Résumé

Le tourisme est un élément important de l'économie européenne, qui mobilise 3 millions d'entreprises, emploie 22,6 millions de personnes (11 % de l'emploi total de l'UE) et représente 9,5 % du PIB de l'UE en 2019. C'est également l'un des secteurs les plus fortement touchés par les conséquences de la pandémie de COVID-19, tant à court terme qu'à moyen et long terme. Les impacts se font sentir dans des écosystèmes touristiques complexes et des chaînes de valeur comprenant un large éventail de secteurs.

L'étude évalue la manière dont les différentes régions touristiques sont affectées par la COVID-19 et quels sont les possibles développements futurs. Elle combine l'analyse de la diversité territoriale et de l'importance économique du tourisme avec les impacts territorialement divers de la pandémie de COVID-19. La dimension temporelle est également prise en compte, car les impacts diffèrent territorialement entre ce que nous avons vu jusqu'à présent et ce à quoi il faut s'attendre à court et moyen terme.

Pour soutenir la reprise vers un tourisme plus résilient et plus vert, une coopération est nécessaire à tous les niveaux, du niveau local au niveau européen. La crise doit être utilisée pour développer de nouvelles solutions pour un tourisme durable et adopter la numérisation comme outil. Tout cela doit se faire dans le cadre de processus de gouvernance multi-niveaux impliquant un large éventail d'acteurs issus de nombreux secteurs et niveaux de gouvernance différents.

Kurzfassung

Der Tourismus ist ein wichtiger Teil der europäischen Wirtschaft, an dem 3 Millionen Unternehmen beteiligt und 22,6 Millionen Menschen beschäftigt sind (11 % der EU-Gesamtbeschäftigung) und der 9,5 % des EU-BIP ausmacht (2019). Er ist auch einer der Sektoren, die am stärksten von COVID-19 betroffen sind. Die Auswirkungen sind im ganzen touristischen Ökosystemen und allen Wertschöpfungsketten zu spüren, die ein breites Spektrum von Sektoren beeinflussen.

In der Studie wird untersucht, wie Tourismusregionen von COVID-19 betroffen sind, und es werden mögliche zukünftige Entwicklungen aufgezeigt. Die Untersuchung kombiniert die Analyse der territorialen Vielfalt und der wirtschaftlichen Bedeutung des Tourismus mit den territorial unterschiedlichen Auswirkungen der COVID-19-Pandemie. Es gibt auch eine zeitliche Dimension, denn die Auswirkungen unterscheiden sich

zwischen dem, was wir bisher gesehen haben, und dem, was kurz- und mittelfristig zu erwarten ist.

Um die Besserung hin zu einem resilienten und umweltfreundlicheren Tourismus zu unterstützen, müssen Maßnahmen auf allen Ebenen, von der lokalen bis zur europäischen, zusammenwirken. Die Krise muss genutzt werden, um neue Lösungen für einen nachhaltigen Tourismus zu entwickeln und die Digitalisierung als Instrument zu nutzen. Dies sollte im Rahmen von Multi-Level-Governance-Prozessen geschehen, an denen ein breites Spektrum von Akteuren aus verschiedenen Sektoren und Verwaltungsebenen beteiligt ist.

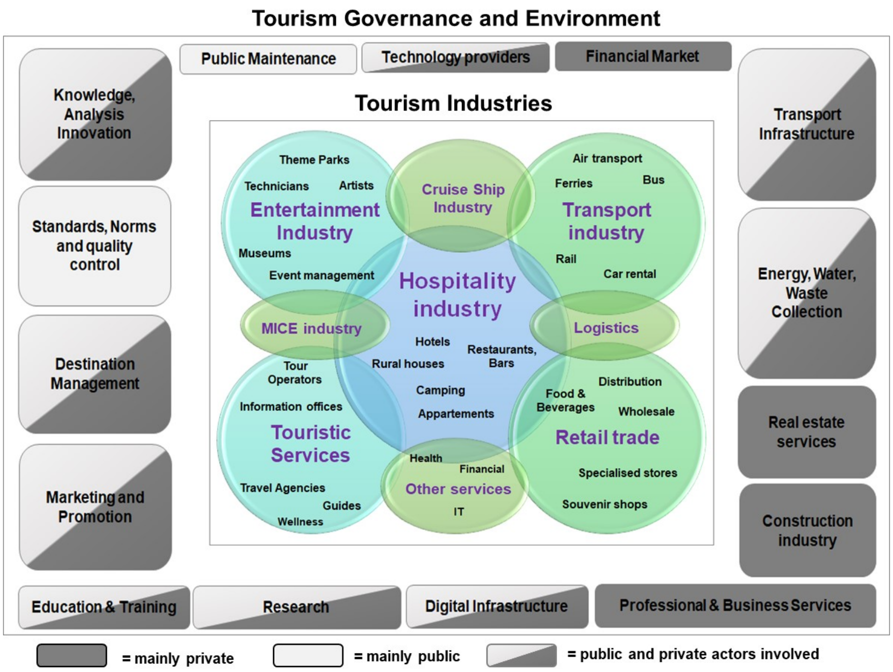
Executive Summary

This summary relates to the final report for the 2020/2021 Study on Regional impacts of the COVID-19 crisis on the tourist sector undertaken for DG REGIO by Spatial Foresight in cooperation with t33, AnySolution and NECSTouR. The study assesses how different tourist regions are affected by COVID-19 and potential future developments. It combines analysis of territorial diversity and the economic importance of tourism with the territorially diverse impacts of the COVID-19 pandemic. There is also a time dimension, as the impacts differ territoriality between what we have seen so far and what we can expect in the short- and medium-term. Based on impacts of the pandemic and lessons learned from policy responses, policy recommendations have been developed to help EU tourism regions adapt for the future, towards sustainability and resilience.

The tourism ecosystem in Europe

Tourism is an important part of the European economy involving 3 million enterprises, employing 22.6 million people (11% of total EU employment) and accounting for 9.5% of EU GDP in 2019. Tourism activities are generally work-intensive and have a higher impact on employment than on value added. Overall, tourism is less productive than other industrial or service sectors. More than in other sectors, SMEs and especially micro-enterprises predominate. Seasonality and low quality of employment is an issue in subsectors such as accommodation and food services. Tourism is the fourth largest EU export category and brings spill-over benefits to the European economy as a whole. EUR 1 of value added generated by tourism results in an additional EUR 0.56 of value added for other industries.

Figure 0-1 Tourism ecosystem



Note: MICE describes activities related to business meetings, incentives, conventions and exhibitions/events.

Source: Own elaboration

The tourism ecosystem covers a wide range of other sectors directly or indirectly affected by tourism, especially in regions with many visitors or important transport hubs. In addition to accommodation, hospitality and tourist services this covers transport services, retail, agri-food, entertainment and culture, as well as education and training, professional and business services, and real estate. Tourism can also have important links with public infrastructure such as transport, water supply and sewage disposal, waste and digital infrastructure. All these mean that tourism activities have a high impact on communities and regions. The territory, natural conditions (e.g. weather, season) and the changing combination of services makes each travel and tourism experience more or less unique, even if services such as accommodation, transport and food are similar and even standardised.

Negative consequences of tourism are increasingly due to environmental impacts, pressure on natural resources, congestion and increased real estate prices. ‘Overtourism’ demands more adaptive tourism planning and management within sustainable and responsible limits. It is also one of the sectors mostly heavily affected by COVID-19, both in the short-term and in the medium to long-term.

Tourism trends

Booking and travel search indicators indicate that travel will not fully recover in the coming months and most experts expect it to reach the levels of 2019 in a few years’ time. For some sectors – in particular business travel – an even longer period of modest levels could be possible as videoconferencing has become more widely accepted.

For the near future, travel and tourism will come with new cautions, anxieties and additional administrative hassle. The COVID-19 pandemic will leave its marks on tourism developments and trends for some time. COVID-19 restrictions and uncertainties dominate trends for 2021/2 and will play a role for years in the tourism sector. Over the next years, these will be replaced by behavioural changes in the wake of the pandemic. Prominent pre-pandemic tourism trends will return closer to 2030. By then digitalisation and eco-friendly tourism are expected to dominate.

Tourism trends play out differently in different types of destination. Areas favourably positioned for increasing same-day tourism in Europe are the main metropolitan areas and their wider catchment areas. More sustainable and eco-friendly tourism is probable along high speed railway lines and night train connections in Europe, allowing for environmentally friendly travelling to a destination. Furthermore, areas with a low ratio of tourists per capita have more favourable starting positions as their carrying capacity can attract more sustainable tourism. Digitalisation in tourism will encourage visitors where there digital means of communication are frequently used by public authorities and for shopping.

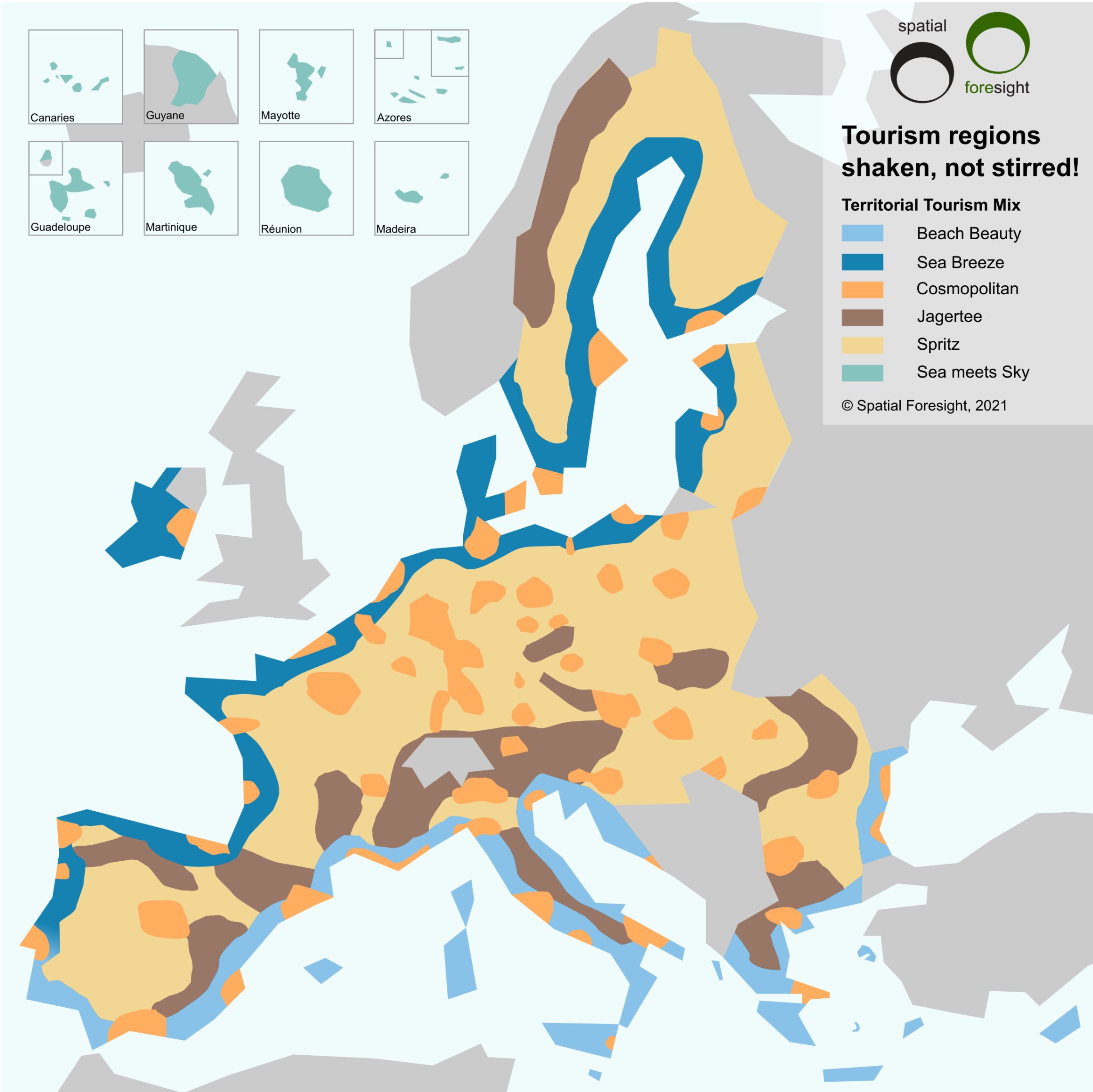
EU tourism regions and COVID-19 impacts

To understand the impact of the COVID-19 pandemic on EU regions, it is important to know more about how EU regions engage with tourism. Employment in tourism varies between 66% in the South Aegean in Greece and only 2% in Mazowiecki, the region surrounding Warsaw in Poland. 87 EU regions have more than 12% of their employment in tourism. These are mainly around the Mediterranean Sea, other regions in Portugal, Spain and France, the Alps, coastal areas of Belgium, the Netherlands and Germany, Estonia, Finland and Sweden.

There are regional variations depending on geography and climate, transport and accommodation, seasonality, origins of tourists, and economic dependency on the sector. All factors are important to understanding the multifaceted nature of tourism regions in Europe. Tourism is at the level of (mostly local) destinations, making it difficult to establish a regional (NUTS2-based) typology of tourist regions in Europe. A large NUTS 2 region like Andalucía in Spain, for example, combines different types of tourism with different tourism products (e.g. sun & beach, urban/city/cultural, rural/nature/active, and mountain/skiing).

In this study many pieces have been brought together into a comprehensive picture. The importance of tourism for regional employment and the origin of tourists per EU region were used as a starting point. Adding qualitative features to quantitative characteristics enabled a more nuanced understanding. In a combined quantitative and qualitative classification of European tourism regions, six main types have been identified and named after typical holiday drinks: 'Beach Beauty', 'Jagertee', 'Sea Breeze', 'Spritz', 'Sea meets Sky' and 'Cosmopolitan' (see Map 0.1). At NUTS2-level, regions rarely connect only with one tourism type, but the classification can help to reflect on their tourism model.

Map 0-1 Typology of tourism regions in the EU



Source: own elaboration

- **'Beach Beauty':** European coastal regions, especially around the Mediterranean, centred on sun and beach with many tourists. Hotels are the predominant accommodation, while air transport is the preferred way to travel.

- **'Jagertee':** Mountain-based tourism regions related to natural and sports activities, especially skiing in winter and hiking in summer. Mostly in the Alps, but also in other mountain areas.

- **'Sea Breeze':** Rural tourism in coastal territories with a high share of domestic tourism. Travel is mostly by car and accommodation is mainly holiday homes, rural houses or camping sites. Examples: Nordic and Baltic countries, but also in Germany, the Netherlands and Ireland.

- **'Spritz':** Rural and/or mountain inland regions in Europe that are less densely populated and have a wealth of cultural and natural heritage. Many are in or close to natural reserves and protected areas.

- **'Sea meets Sky':** EU outermost regions are a specific form of tourism region, combining sun and beach with rural/natural and urban/cultural tourism.

- **'Cosmopolitan':** European city tourism regions offering activities such as shopping, cultural events and attractions such as heritage, museums and landmarks, but also business travel, events and conference.

In 2020, the COVID-19 pandemic put a sudden halt to tourism leading to unprecedented declines. Tourism is possibly the most affected sector by the COVID-19 pandemic. In October 2020, the OECD estimated a decline in international tourism of some 80%. However, impacts vary from region to region. Urban and coastal tourism in the Mediterranean saw the largest declines. Urban tourism declined with considerable variations between urban areas in 2020 (e.g. -80% in Dublin and -55% in Hamburg). Destinations largely relying on air travel and international tourism were most hit. On the other hand, many coastal and rural tourism regions with strong domestic markets were less severely affected. Despite some recovery, the impact of new travel burdens and anxieties on travel is also felt during the 2021 summer season. Although tourist numbers increased again across Europe – not at least thanks to vaccinations – uncertainties about safe and seamless travel remained for many people.

A wide range of diverse COVID-19 impacts on types of tourism regions tourism emerged in this study. 'Beach Beauty' and 'Cosmopolitan' regions show the biggest drop in visitors and severe negative effects on accommodation, catering and tourism. Only a low share of international and EU tourists could be replaced with domestic tourism. Due to partial openings, 'Jagertee' and 'Sea Breeze' regions benefitted from some, mostly domestic tourism, in summer 2020. 'Jagertee' regions focusing on winter tourism then suffered from the winter 2020/21 lockdowns and an almost total loss of visitors and business in the winter and spring of 2021. Regions with a more rural and natural 'Spritz' tourism saw fewer negative effects, and some camping or holiday home tourism even increased during the pandemic.

Potential negative impacts of COVID-19

To understand the regional diversity of COVID-19 pandemic impacts requires differentiating between exposure and sensitivity. Following the approach of a Territorial Impact Assessment (Böhme & Besana, 2020; ESPON, 2013; Essig & Kaucic, 2017; Gaugitsch et al., 2020) the analysis methodology provides a rough snapshot of the exposure and sensitivity of European regions to COVID-19 policy responses.

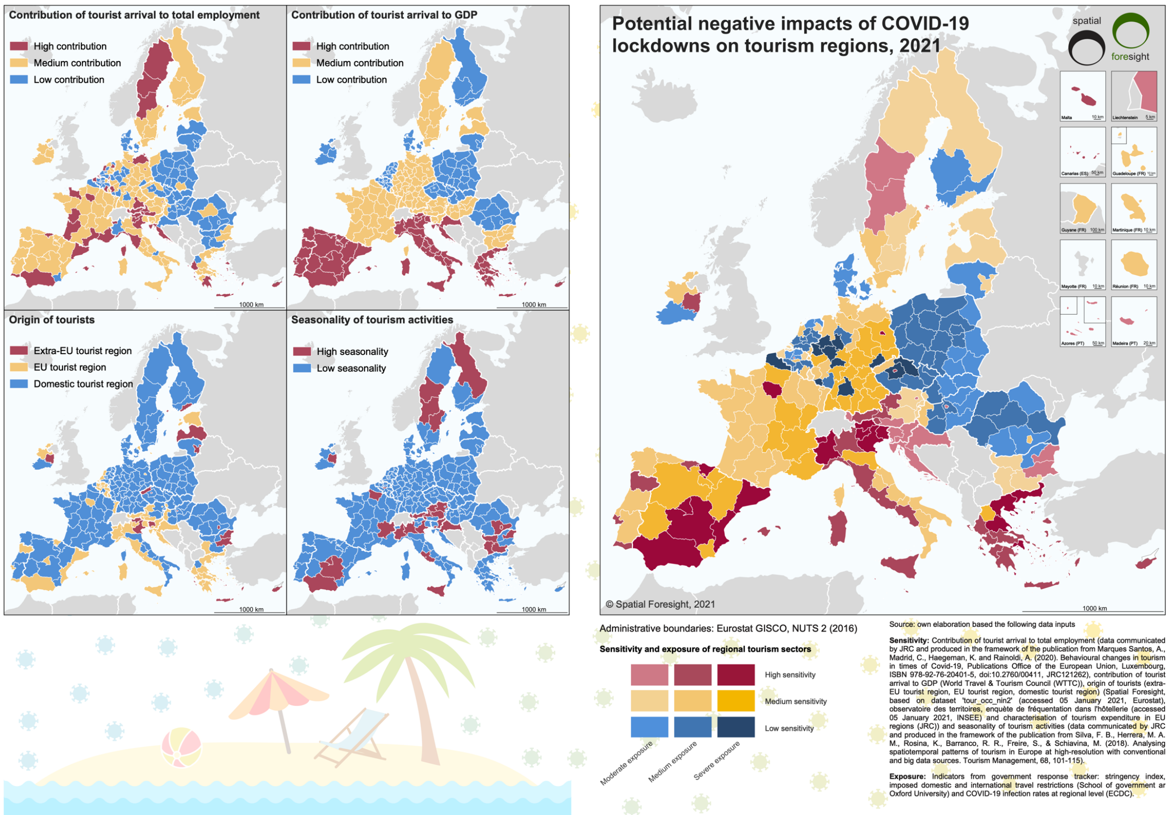
Following this approach, regional economies in Europe were analysed for a first appraisal of regions most affected by lockdowns and travel restrictions. This concerns regional differences in negative as well as possible positive effects.

How much lockdown measures and travel restrictions affect local and regional development depends on a place's sensitivity to these. For territorial impact assessments, sensitivity is understood in terms of the degree that regional development is affected due to specific regional characteristics and endowments. The structural characteristics of regional tourism ecosystems are therefore particularly relevant to understand potential negative sensitivities to lockdowns. Especially important are: Contribution of tourism to regional employment, Contribution of tourism to GDP (national), Share of EU and non-EU tourists (reliance on non-domestic tourists) and high seasonality with a focus on winter and spring as these regions risk two lost seasons.

The regions potentially most affected, i.e. those with high sensitivity and high exposure, are major urban destinations, including the capital regions of Athens, Berlin, Madrid and

Paris, and destinations in Southern Europe and the Alps, in particular on the Iberian peninsula and in Italy as well as Central Macedonia in Greece and Cyprus. This is due to their dependency on tourism for GDP and employment. Large parts of Eastern and Northwest Europe are less affected as tourism plays a lesser role in the regional economies. This is also reflected in the sensitivity of different types of 2021-27 Cohesion Policy regions. While about 45% of less developed regions have low sensitivities, 45% of the more developed and 63% of transition regions have medium sensitivities. About 1/3 of both the more and less developed regions show high sensitivity while only 15% of transition regions do.

Map 0-2 Potential negative impacts of COVID-19 on tourism regions



Source: own elaboration

Potential positive impacts of COVID-19

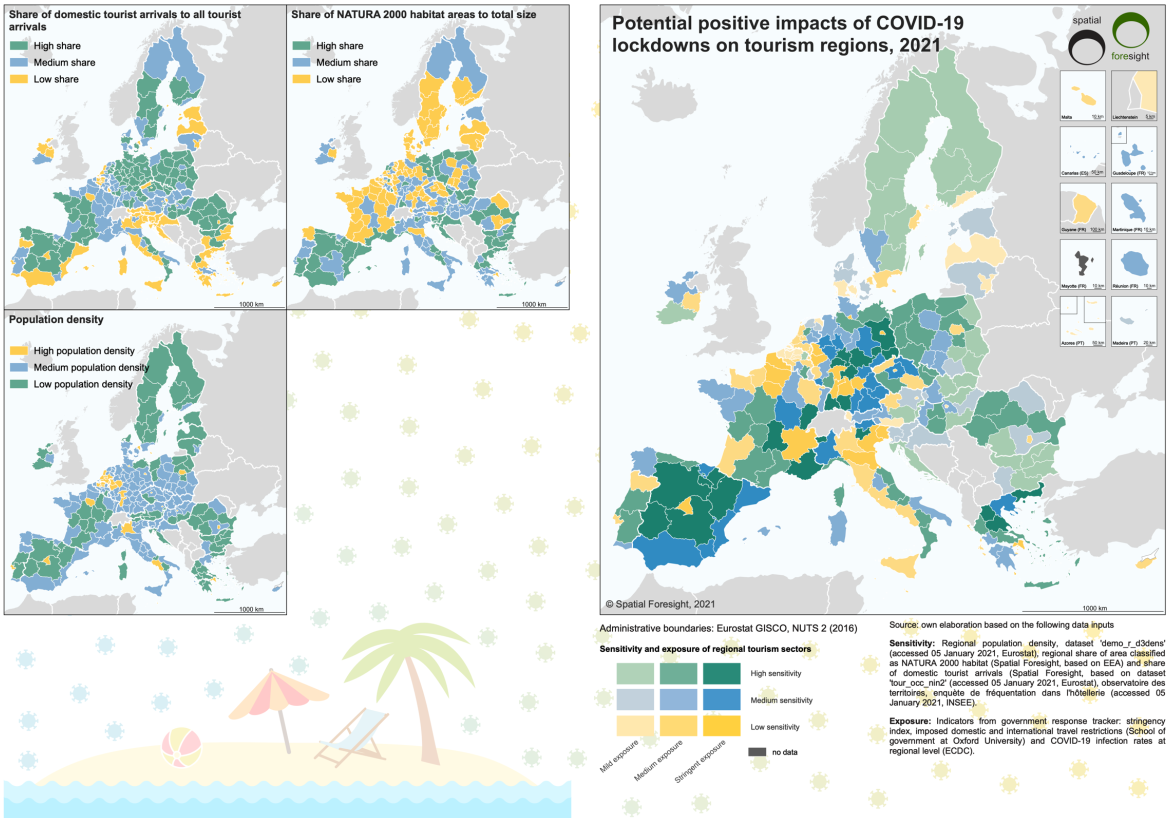
As most tourists could not follow their usual holiday preferences during the pandemic some explored new destinations. These were often closer to home and with a stronger emphasis on domestic travel, so for some regions the pandemic brought new tourism potential. The characteristics of regional tourism ecosystems are therefore particularly relevant to also understand potential positive sensitivities to lockdowns. This includes low population density, high share of domestic tourists and attractive environments such as NATURA 2000 areas.

The regions where tourism could benefit from the pandemic have high sensitivity and low exposure. This includes most regions in Bulgaria, Finland and Sweden, as well as Burgenland and Styria in Austria, Limburg in Belgium, Adriatic Croatia, the two Eastern regions of Slovakia (Stredné Slovensko and Východné Slovensko), Eastern regions in Poland (Świętokrzyskie, Lubelskie, Podkarpackie and Podlaskie), Sud-Vest Oltenia in Romania, and Northern Hungary (Észak-Magyarország) and the Southern Great Plain (Dél-Alföld) in Hungary.

For 2021-27 Cohesion Policy regions, less developed and transition regions are more likely to benefit from positive effects than developed regions. 56% of the less developed and 46% of the transition regions have high sensitivity, while only 19% of more developed regions do. This is also confirmed by 49% of more developed regions showing low sensitivity, while only 12% of less developed and 19% of transition regions do.

This analysis provides only a rough proxy for areas with potential positive impacts. For a more nuanced geographical assessment there is insufficient comparable data. Still, it may help to raise awareness that the pandemic also brought benefits for some players in the tourism sector though these are by far outweighed by negative impacts.

Map 0-3 Potential positive impacts of COVID-19 on tourism regions



Source: own elaboration

Resilience and preparedness

The resilience of regional tourism ecosystems varies greatly depending on the tourism model in an area and the weight of tourism in the local and regional economy. Clues to resilience include the diversity of tourism products and target groups, good governance, openness, innovation and access to funding and resources.

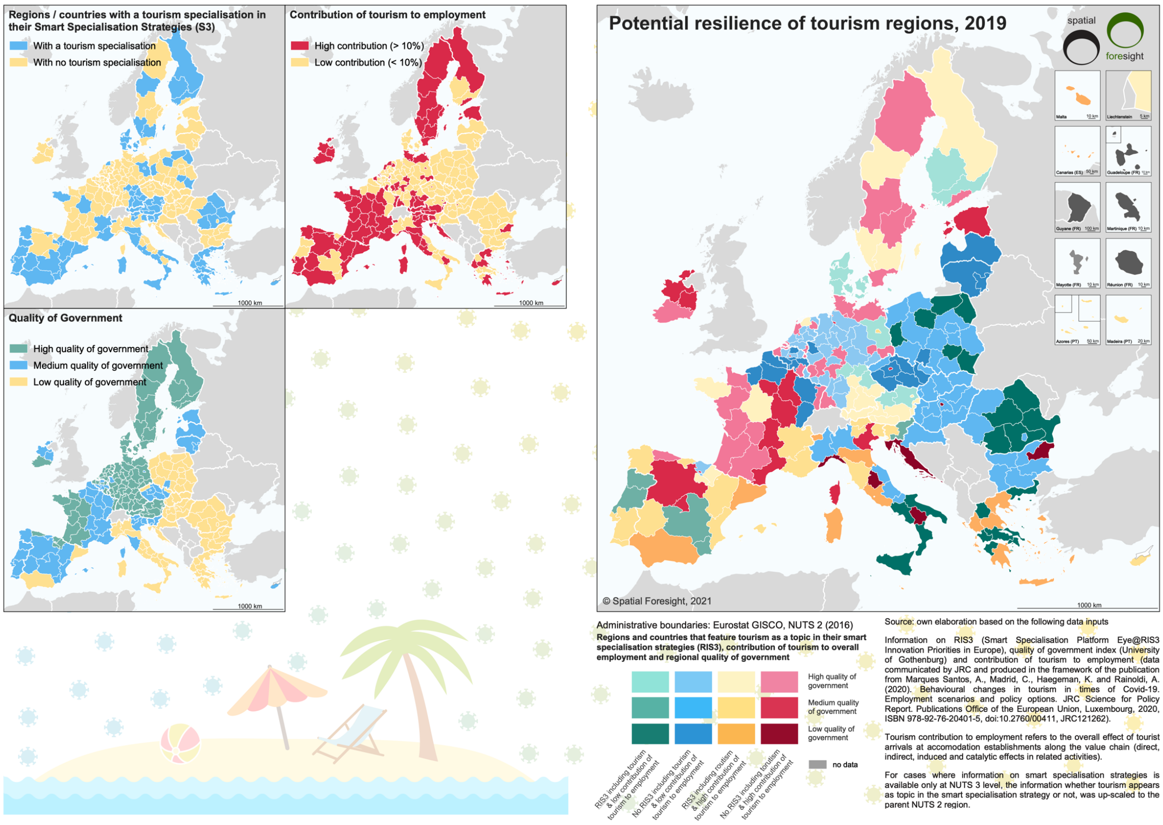
The analysis, reflected in the map, takes into account the share of tourism in the regional economy to reflect regional economic diversity beyond tourism, the quality of government and governance as pre-requisites for long-term, sustainable strategies, social trust and legitimacy as well as research and innovation strategies for smart specialisation (RIS3) addressing tourism.

Following this rationale, regions with the lowest resilience to shocks for tourism are Adriatic Croatia, North-eastern Bulgaria, Budapest, and the Italian regions of Liguria, Basilicata and Umbria. These have comparably high shares of employment in tourism but low quality of government and no RIS3 addressing tourism.

The potential stars in terms of resilience are regions with high levels of tourism employment, high quality of governance and a RIS3 addressing tourism. Among these are Austrian tourism regions of Tirol, Salzburg, Kärnten, Vorarlberg, Burgenland, Styria and Vienna. Furthermore, large parts of Bavaria and Berlin in Germany, Northern

Finland, Friesland in the Netherlands, as well as Middle Norrland, West Sweden and Småland & islands in Sweden fall into this group.

Map 0-4 Teaser on the resilience of (tourism) regions



Source: own elaboration

Key lessons from analysis of policy initiatives

89 policy initiatives were collected for this study, of which 16 were reviewed in more detail. Results are included in an Annex Document to the Final Report. The analysis of policy initiatives identified some lessons in view of the upcoming support for tourism in the new Cohesion Policy funding period (2021-2027). The lessons can guide decision makers on the recovery and preparation for the future of tourism regions.

Manage tourism growth responsibly. More and more policy initiatives reflect the value of tourism for local and regional economies and try to either increase quality and effectiveness or reduce the negative environmental effects through specific policy measures. The COVID-19 crisis and the tourism standstill in many European regions has shown how tourism affects regional economies and life in general. There is still room to develop measures that help manage growth and increase local benefits.

New destinations. Less-crowded rural destinations, national parks and other nature-related places, even a village just outside a big city, have been the winners of leisure and travel during the pandemic, mostly for domestic visitors. It is recommended building the tourism offer on a regions' natural and cultural heritage, to engage small players across the territory and articulate governance of the tourism ecosystem to avoid harmful effects of mass tourism.

Tourism needs to be sustainable. Many tourism initiatives aim at reducing the negative effects of travel, accommodation, catering and activities on the environment. Tourism must become more responsible and respectful of the territory and local communities and decarbonisation is an objective of many new strategies and actions. Circular approaches should help to reduce the amount of waste generated by visitors and to increase the more efficient use of resources. Sustainability management should become part of destination management.

Digitisation becomes the new backbone of tourism. Digital tools for tourists and destination management have come to stay and will boost digitisation also in non-health related areas. The EU Digital COVID Certificate, national vaccination certificates and up-to-date information on safe travel conditions will probably become usual in the coming months and years. At the same time, many destination management organisations have used the mandatory business pause to further develop their market intelligence tools, decision support systems, training schemes for digital skills, social media marketing instruments and online collaboration networks.

Collaboration, innovation and creative ideas are essential. An innovative and open mindset as well as creative ideas are needed to adapt to change and prepare tourism regions for the future. Not only the public sector but also other players in the tourism ecosystem need to get engaged. Ideas and innovation as well as new partnerships should to be accelerated. Better coordination between national and regional tourism policies and measures needs to be ensured.

Policy pointers

Appropriate and place-specific policy mixes are essential to support recovery of the tourism sector while at the same time preparing for shifts towards digitalisation and sustainable tourism. Overall, regional initiatives boosting local development and collaboration for many different partners within a tourism ecosystem are at the core of most policy initiatives. To make tourism more resilient to external shocks and to establish sustainable tourism requires working with players along the whole value chain and often from outside the system, across the border or outside the destination.

Local and regional action

Local and regional action needs to make destinations attractive for both visitors and residents and embed tourism as an important part of broader spatial development strategies. Regional authorities can spur the digitalisation of tourism and ensure that tourism development involves all players in the ecosystem. New tourism models need to focus on the development of place-based value chains so more of the economic benefits stay in the region.

In line with the 2021-2027 Policy Objectives, EU Cohesion Policy programmes can boost the recovery of tourism in many ways.

Policy Objective 1 – A smarter Europe: Develop smart tourism destinations. Strengthen tourism stakeholders as promoters of innovation. Smart Specialization Strategies can help to develop an innovation-friendly environment to tourism players and involve the whole value chain. Digital transformation plays a relevant role in many tourism initiatives.

Policy Objective 2 – A greener, low-carbon Europe: Working with the whole tourism ecosystem and other players (mobility, agri-food producers, energy generation, travel industry, cruise lines, etc.) in the territory is key to becoming more climate-friendly as a destination and as a region. This is very relevant during the design and implementation of sustainability strategies in tourism destinations and for the tourism products. More sustainable tourism models can only be achieved when all stakeholders work together.

Policy Objective 3 – A more connected Europe: Sustainable tourism relies on sustainable transport options. This includes alternative travel modes (train, bus) that are less CO2 intensive, as well cycling infrastructure. Furthermore, reducing the negative environmental effects of cruise ship tourism and air travel can support sustainable tourism.

Policy Objective 4 – A more social Europe: Tourism is an instrument to promote local economic and social development. Health tourism is an emerging model. Education can have a direct impact on the quality of tourism employment.

Policy Objective 5 – Europe closer to citizens: Facilitation of bottom-up initiatives, that can join larger projects and the creation of adequate spaces and opportunities for grass-roots initiatives to meet with innovators, digital experts, entrepreneurs and funders. These are essential to ensure that tourism developments are well embedded in the region.

European level action

European level action is needed to support the recovery towards more resilient, sustainable and digital tourism in Europe as stated in the Council conclusions of 27/05/2021 and already partially proposed in the Commission's stakeholder consultation on the 'transition pathway for tourism' (Summer 2021).

European tourism single market. The European single market does not fully cover common standards and requirements for tourism to ensure that tourists can easily travel across the EU with a single certificate of COVID-19 requirements and with common sustainable tourism standards.

- Safe and seamless travel within the EU requires more coordination and common standards for COVID-19 certificates and the rights that come with them.
- Sustainable tourism in the EU requires common standards and certification systems for hospitality. In the best case, this would not be a new certificate but the adjustment of existing international standards and certificates.

European tourism roundtable(s). Tourism is a horizontal activity and depends on the collaboration of a wide range of players. To strengthen tourism in European policy a number of tourism roundtables might help.

- A European interservice roundtable could help better coordinate EU policies, initiatives and support tools which affect tourism destinations and industries across all relevant DGs.
- A roundtable with ERDF, CF, ESF and EAFRD programmes addressing tourism, e.g. in the context of COESF and EGESIF, could strengthen mutual approaches to supporting tourism under Cohesion Policy. Also Recovery and Resilience Fund players should be included.
- A European public-private roundtable on tourism could bring together key public policy makers and representatives from the tourism industry and connect important actions such as the Virtual Tourism Observatory to the needs of regions and decision-makers.

European tourism knowledge. For regional tourism statistics as well as platforms monitoring tourism policies there is room for further development.

- Eurostat collects some comparable regional tourism statistics. However, to better inform decision making, data collection for more common indicators is needed.
- Following the example of EU Science Hub Knowledge Centres, a European platform for monitoring progress on Sustainable Tourism at regional level could be developed collecting information on smart tourism strategies.

The final report closes with more **specific lessons for the different types of tourism regions**. These generally highlight the need to overcome negative effects of mass tourism and dependence on travel industry players from outside the region with tourism models and approaches that empower the destination and promote community engagement. New measures should ensure that tourism activities generate more value and respect for the territory. Sustainability needs to be managed for the destination as a whole, so solutions should not be left to individual initiatives or pilot projects.

Taken together, action at all levels must work towards decarbonising and reducing the negative environmental effects of tourism. Digitisation and innovation will be inevitable tools for the recovery of tourism destinations and industries, making them more resilient and sustainable. Furthermore, tourism needs to be seen as important in spatial planning and should be in continuous contact with sector policies such as transport, digital infrastructure and equipment, water and waste management, energy, public spaces and infrastructure. Good governance and collaboration of a wide range of players is needed in destinations, Member States and the EU, as well as across borders in the context of Interreg.

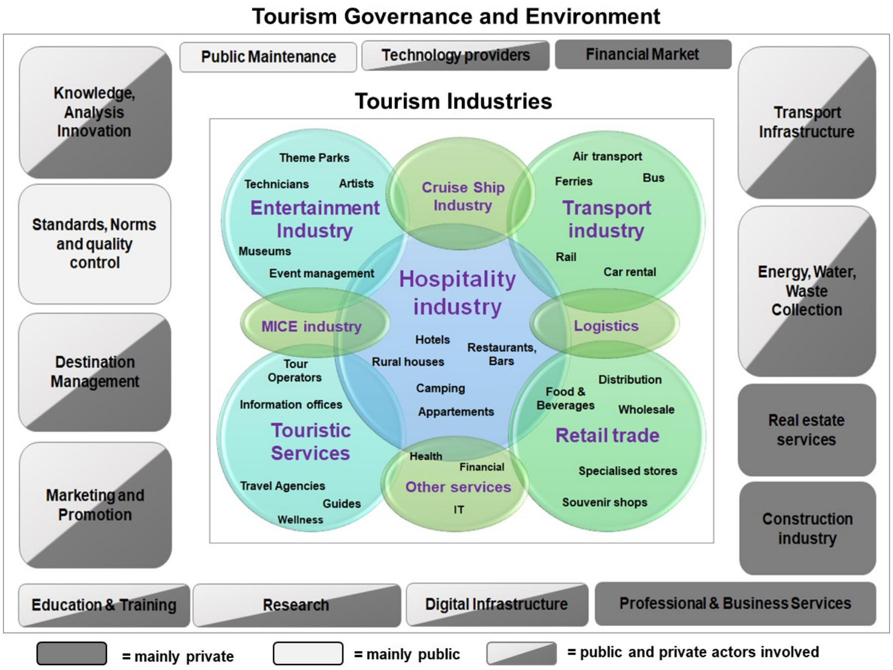
Synthèse

Ce résumé concerne le rapport final de l'étude menée en 2020/2021 sur les impacts régionaux de la crise COVID-19 sur le secteur touristique, réalisée pour la DG REGIO par Spatial Foresight en coopération avec t33, AnySolution et NECSTouR. L'étude évalue comment les différentes régions touristiques sont affectées par la COVID-19 et quels sont les possiblesdéveloppements futurs. Elle combine l'analyse de la diversité territoriale et de l'importance économique du tourisme avec les impacts territorialement différenciés de la pandémie de COVID-19. La dimension temporelle est également prise en compte, car les impacts diffèrent territorialement entre ce que nous avons vu jusqu'à présent et ce à quoi il faut s'attendre à court et moyen terme. Sur la base des résultats concernant les impacts de la pandémie et des enseignements tirés des réponses politiques, des recommandations politiques ont été élaborées pour aider les régions touristiques à s'adapter et accompagner le tourisme européen sur la voie de la durabilité et de la résilience.

L'écosystème du tourisme en Europe

Le tourisme est un élément important de l'économie européenne, qui mobilise 3 millions d'entreprises, emploie 22,6 millions de personnes (11 % de l'emploi total de l'UE) et représente 9,5 % du PIB de l'UE en 2019. Les activités touristiques sont généralement à forte intensité de travail et ont un impact plus important sur l'emploi que sur la génération de valeur ajoutée. Globalement, le tourisme a une faible productivité par rapport à d'autres secteurs industriels ou de services. Plus que dans d'autres secteurs, les PME, notamment les micro-entreprises, sont prédominantes. Le caractère saisonnier et la faible qualité de l'emploi sont un problème dans les sous-secteurs concernés (par exemple, l'hébergement ou les services de restauration). Le tourisme est la quatrième catégorie de services exportés par l'UE et a des retombées positives sur l'économie européenne dans son ensemble : un euro de valeur ajoutée générée par le tourisme entraîne 0,56 euro de valeur ajoutée supplémentaire dans d'autres secteurs.

Figure 0.1 Écosystème du tourisme



Note : MICE décrit les activités liées aux réunions d'affaires, aux voyages de motivations, aux conventions et aux expositions/événements.

Source : visuel élaboré par les auteurs

L'écosystème du tourisme couvre un large éventail d'autres secteurs qui sont directement ou indirectement affectés par le tourisme, en particulier dans les régions accueillant de nombreux visiteurs ou d'importantes plateformes de transport. Outre l'hébergement, l'accueil et les services touristiques, il s'agit notamment des services de transport, du commerce de détail, de l'agroalimentaire, de l'industrie du divertissement et de la culture, mais aussi de l'éducation et de la formation, des services professionnels et commerciaux et de l'immobilier. L'activité touristique peut également avoir des liens importants avec les infrastructures publiques telles que les transports, l'approvisionnement en eau et l'évacuation des eaux usées, les déchets, mais aussi les infrastructures technologiques et numériques. Tous ces liens font que les activités touristiques ont un fort impact sur les sociétés et les régions. Ce lien avec le territoire, la dépendance aux conditions naturelles (par exemple, les conditions météorologiques, les saisons) et la combinaison changeante des services rendent chaque expérience de voyage et de tourisme plus ou moins unique, même si les services tels que l'hébergement, le transport et la restauration sont similaires, voire standardisés.

De plus en plus, les conséquences négatives du tourisme dues aux impacts environnementaux, à la pression sur les ressources naturelles ou à la congestion et à l'augmentation des prix de l'immobilier en raison du surtourisme exigent une planification et une gestion adaptée pour permettre un développement du tourisme durable et responsable. C'est également l'un des secteurs les plus touchés par les conséquences de la COVID-19, tant à court terme qu'à moyen et long terme.

Tendances du tourisme

Les indicateurs de recherche et de réservation de voyages indiquent que le volume de voyages ne se redressera pas complètement dans les mois à venir et la plupart des experts s'attendent à ce que le nombre de déplacements n'atteigne le niveau de 2019 que dans quelques années. Pour certains secteurs - en particulier les voyages d'affaires - une période encore plus longue de niveaux modestes pourrait être possible, la vidéoconférence étant plus largement acceptée.

Dans un avenir proche, les voyages et le tourisme s'accompagneront de nouvelles mises en garde, d'inquiétudes et d’obstacles administratifs supplémentaires. La pandémie de COVID-19 laissera des traces dans l'évolution et les tendances du tourisme. Les restrictions et incertitudes liées à la COVID-19 dominent les tendances pour 2021/2 et joueront un rôle pendant quelques années encore. Au cours des prochaines années, elles seront remplacées par des tendances liées aux changements de comportement dans le sillage de la pandémie de COVID-19. Les grandes tendances touristiques pré-pandémiques reviendront à moyen terme, vers 2030. D'ici là, les tendances liées à la numérisation et au tourisme écologique devraient dominer.

Les tendances touristiques se manifestent différemment selon les types de destinations. Les zones favorablement positionnées pour voir se développer un tourisme à la journée sont les principales zones métropolitaines et leurs zones d'attraction plus larges en Europe. En matière de tourisme durable et écologique, il existe des conditions de localisation favorables le long des principales lignes ferroviaires à grande vitesse et des lignes de trains de nuit, qui permettent de voyager de manière plus écologique vers le lieu de séjour. En outre, les régions à faible pression touristique (ayant un faible taux de touristes par habitant) se trouvent en position favorable, car leur capacité de charge permet encore d'attirer un tourisme plus durable. La numérisation dans le tourisme bénéficie enfin de conditions favorables, là où il y a une habitude d'utilisation fréquente des moyens numériques pour la communication avec les autorités publiques ou pour les achats.

Régions touristiques de l'UE et impacts de la COVID-19

Pour comprendre l'impact de la pandémie de COVID-19 sur les régions européennes, il est important d'en savoir plus sur la manière dont les régions sont impliquées dans le tourisme. Au niveau régional, l'emploi dans le tourisme varie entre 66 % dans le sud de la mer Égée en Grèce et seulement 2 % dans la région de Mazowiecki, qui entoure

Varsovie en Pologne. Dans 87 régions de l'UE, plus de 12 % des emplois sont liés au tourisme. Il s'agit principalement du pourtour de la mer Méditerranée, au Portugal, en Espagne et en France. Il s’agit également des Alpes, des zones côtières de la Belgique, des Pays-Bas et de l'Allemagne, de l'Estonie, de la Finlande et de la Suède.

Il existe des variations régionales en fonction de la géographie et du climat, des modes de transport et d'hébergement, de la saisonnalité, de l'origine des touristes et de la dépendance économique vis-à-vis du secteur du tourisme. Tous ces facteurs sont importants pour comprendre la nature multiforme des régions touristiques en Europe. Le tourisme se déroule au niveau de destinations (essentiellement locales), ce qui rend difficile l'établissement d'une typologie des régions touristiques en Europe qui serait construite au niveau NUTS2. Une grande région NUTS2 comme l'Andalousie en Espagne, par exemple, combine différents types de tourisme avec différents produits touristiques (par exemple, soleil et plage, urbain/ville/culturel, rural/nature/actif, montagne/ski).

Dans cette étude, les éléments ont été rassemblés en une image globale. L'importance du tourisme pour l'emploi régional et l'origine des touristes par région de l'UE ont servi de point de départ. L'ajout de caractéristiques qualitatives aux caractéristiques quantitatives a permis une compréhension plus nuancée. Dans une classification quantitative et qualitative combinée des régions touristiques européennes, six types principaux ont été identifiés et nommés d'après des boissons de vacances typiques : Beach Beauty", "Jagertee", "Sea Breeze", "Spritz", "Sea meets Sky" et "Cosmopolitan" (voir carte 0.1). Au niveau NUTS2, les régions se rattachent rarement à un seul type de tourisme, mais cette classification peut les aider à réfléchir à leur modèle touristique.

- **Type de tourisme "Beach Beauty" :** Régions côtières européennes, notamment autour de la mer Méditerranée, centrées sur l’attrait pour le soleil et la plage et accueillant de nombreux touristes. L'hébergement en hôtel est prédominant, tandis que le transport aérien est le moyen de transport privilégié.

- **Type de tourisme "Jagertee" :** Régions touristiques de montagne liées à des activités naturelles et sportives, principalement le ski en hiver et la randonnée en été. Localisé dans les Alpes, mais aussi dans d'autres régions montagneuses.

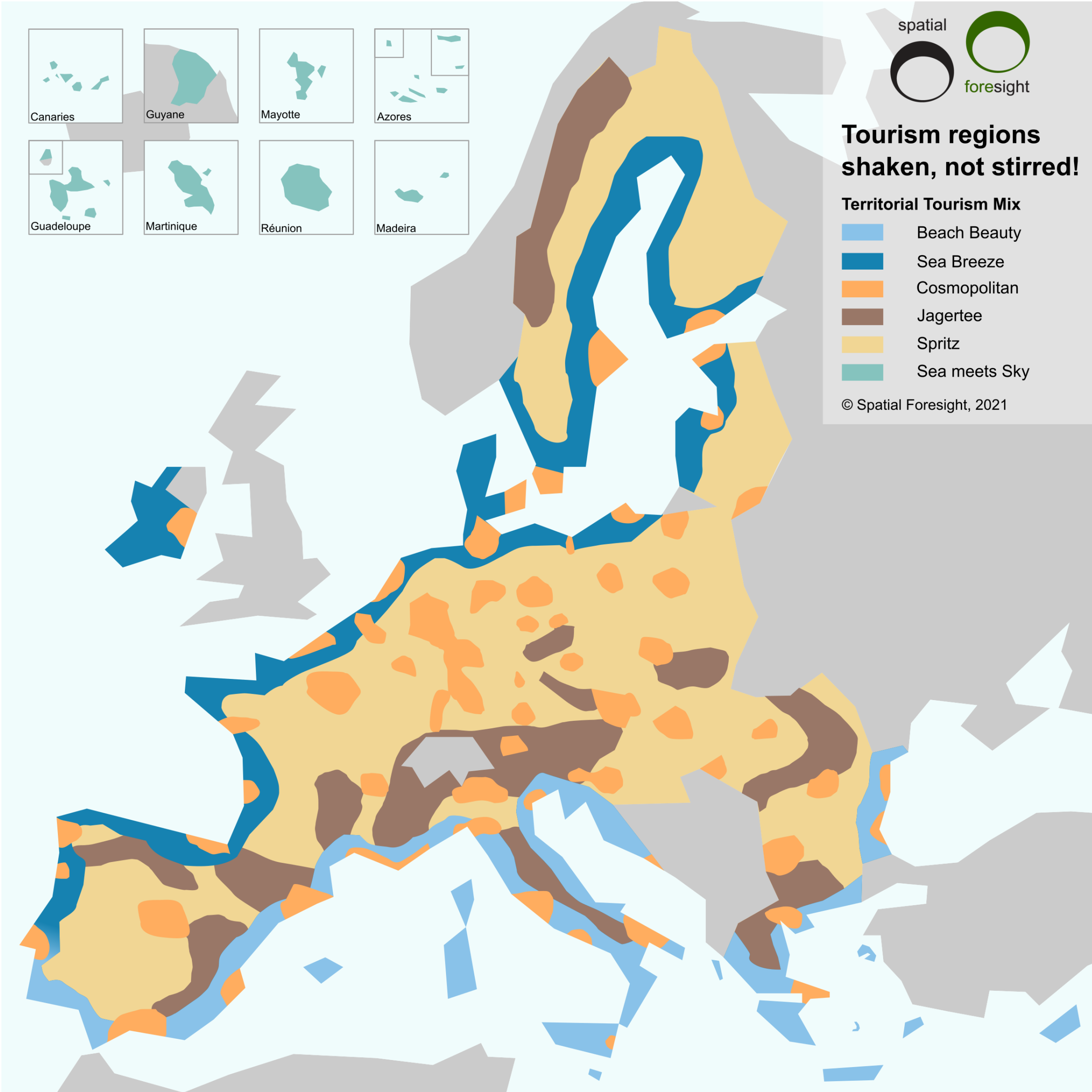
- **Type de tourisme "Sea Breeze" :** Tourisme rural dans les territoires côtiers avec une part élevée de tourisme domestique. Les déplacements se font principalement en voiture et l'hébergement se concentre sur les maisons de vacances, les chambres d’hôtes ou les campings. Exemples : dans les pays nordiques et baltes, mais aussi en Allemagne, aux Pays-Bas et en Irlande.

- **Type de tourisme "Spritz" :** Régions rurales et/ou montagneuses de l'intérieur de l'Europe qui sont moins densément peuplées et possèdent un riche patrimoine culturel et naturel. Nombre d'entre elles sont situées dans ou à proximité de réserves naturelles et de zones protégées.

- **Type de tourisme "Sea meets Sky" :** Les régions ultrapériphériques de l'UE représentent une forme spécifique de région touristique, combinant le soleil et la plage avec le tourisme rural/naturel et urbain/culturel.

- **Type de tourisme "Cosmopolitan" :** Régions touristiques urbaines européennes proposant des activités telles que le shopping, des événements culturels, des attractions telles que les lieux de patrimoine, les musées et les monuments, mais aussi des voyages d'affaires, des événements et des conférences.

Carte 0 -1 Typologie des régions touristiques de l'UE



Source : élaboration propre

En 2020, la pandémie de COVID-19 a porté un coup d'arrêt brutal au tourisme et entraîné des réductions d’activité sans précédent. Le tourisme est probablement le secteur le plus touché par les conséquences de la pandémie de COVID-19. En octobre 2020, l'OCDE a estimé une baisse du tourisme international de l'ordre de 80 %. Toutefois, les impacts concrets varient d'une région à l'autre. Le tourisme urbain et le tourisme côtier en Méditerranée ont connu les baisses les plus importantes. Le tourisme urbain a diminué en 2020, avec des variations considérables entre les zones urbaines (par exemple, -80 % à Dublin ou -55 % à Hambourg). Les destinations qui dépendent largement du transport aérien et du tourisme international ont été les plus touchées. En revanche, de nombreuses régions côtières dotées d'un marché intérieur solide et les régions touristiques rurales ont été moins sévèrement touchées. Malgré une certaine reprise depuis l'été 2021, l'impact sur les voyages des nouvelles contraintes et des craintes liées à la COVID-19 se fait également sentir pendant la saison estivale 2021. Bien que le nombre de touristes ait à nouveau augmenté dans toute l'Europe - notamment grâce à la vaccination – les voyageurs potentiels restent sensibles aux incertitudes concernant la sécurité et la fluidité des voyages.

L’éventail d'impacts divers de la COVID-19 sur le tourisme dépend du type de régions touristiques considéré. Dans l'ensemble, les régions de type touristique "Beauté des plages" et "Cosmopolite" affichent la plus forte baisse du nombre de visiteurs et de graves effets négatifs sur l'hébergement, la restauration et les activités touristiques.

Seule une faible part des touristes internationaux et européens habituels a pu être remplacée par le tourisme national. En raison des ouvertures partielles, les régions de type touristique "Jagertee" et "Sea Breeze" ont bénéficié d'un certain tourisme, principalement national, au cours de l'été 2020. Les régions de type "Jagertee", axées sur le tourisme de sports d'hiver, ont ensuite souffert des fermetures de l'hiver 2020/21 et de la perte presque totale de visiteurs et d'activités au cours des mois d'hiver et du printemps 2021. Les régions "Spritz" axées sur un tourisme plus rural et naturel, ont été celles qui ont subi le moins d'effets négatifs, et certains types de vacances, comme le camping ou les locations de vacances, ont même augmenté leur activité pendant la pandémie.

Incidences négatives potentielles de la COVID-19

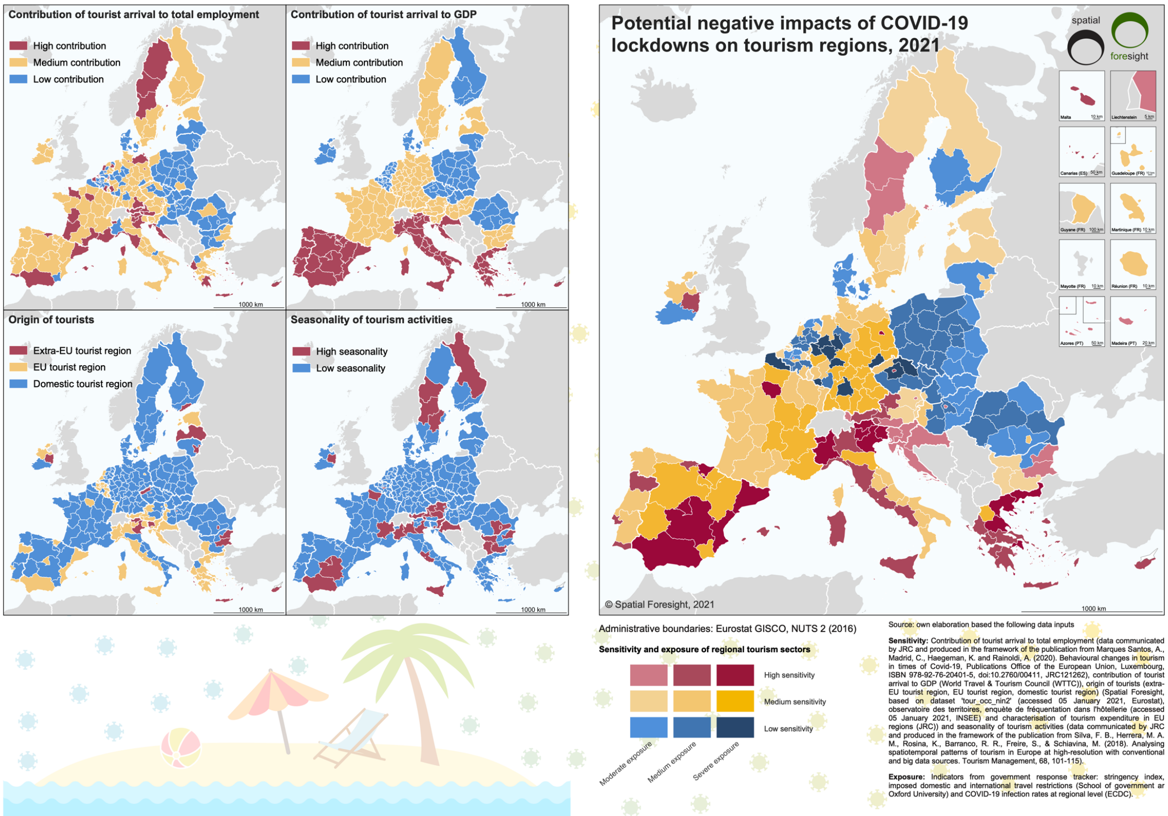
Comprendre la diversité régionale des impacts de la pandémie de COVID-19 implique de distinguer exposition et sensibilité. En suivant l'approche d'évaluation d'impact territorial (Böhme & Besana, 2020 ; ESPON, 2013 ; Essig & Kaucic, 2017 ; Gaugitsch et al., 2020), la méthodologie d'analyse fournit un instantané approximatif de l'exposition et de la sensibilité des régions européennes aux réponses politiques apportées face à la COVID-19.

En suivant cette approche, les économies régionales en Europe ont été analysées, ce qui a permis d'identifier les régions les plus touchées par les confinements et les restrictions de déplacement dus à la COVID-19. Cela a fait apparaître d'importantes différences régionales dans les impacts négatifs immédiats ainsi que les effets positifs possibles.

L'impact des mesures de confinement et les restrictions de déplacement sur le développement local et régional dépend de la sensibilité d'un lieu à ces mesures. Dans le contexte de l'évaluation d'impact territorial, la sensibilité s'entend comme la mesure dans laquelle le développement régional sera affecté en raison de caractéristiques et de dotations régionales spécifiques. Les caractéristiques structurelles des écosystèmes touristiques régionaux sont donc particulièrement pertinentes pour comprendre les sensibilités négatives potentielles aux mesures de confinement. Pour cela, les aspects suivants ont été pris en considération : contribution du tourisme à l'emploi régional, contribution du tourisme au PIB (national), part des touristes européens et non européens (dépendance aux touristes non nationaux) et caractère saisonnier ou non avec un accent sur l'hiver et le printemps car ces régions risquent deux saisons perdues.

Les régions potentiellement les plus touchées, c'est-à-dire celles qui présentent une sensibilité et une exposition élevées, sont les destinations urbaines, notamment les capitales Athènes, Berlin, Madrid et Paris, et les destinations situées principalement dans le sud de l'Europe et dans les Alpes. C'est le cas en particulier des régions de la péninsule ibérique et de l'Italie, ainsi que la Macédoine centrale en Grèce et Chypre, en raison de leur dépendance vis-à-vis du tourisme (en termes de PIB et d'emploi). De grandes parties de l'Europe de l'Est et du Nord-Ouest sont moins touchées car le tourisme joue un rôle moins important dans les économies régionales. Cela se reflète également dans la sensibilité par types de régions de la politique de cohésion pour 2021-27. Alors qu'environ 45 % des régions moins développées présentent une faible sensibilité, 45 % des régions plus développées et 63 % des régions en transition présentent une sensibilité moyenne. Environ 1/3 des régions plus et moins développées présentent une sensibilité élevée, contre seulement 15 % des régions en transition.

Carte 0 -2 Impacts négatifs potentiels de COVID-19 sur les régions touristiques



Source : visuel élaboré par les auteurs

Impacts positifs potentiels de la COVID-19

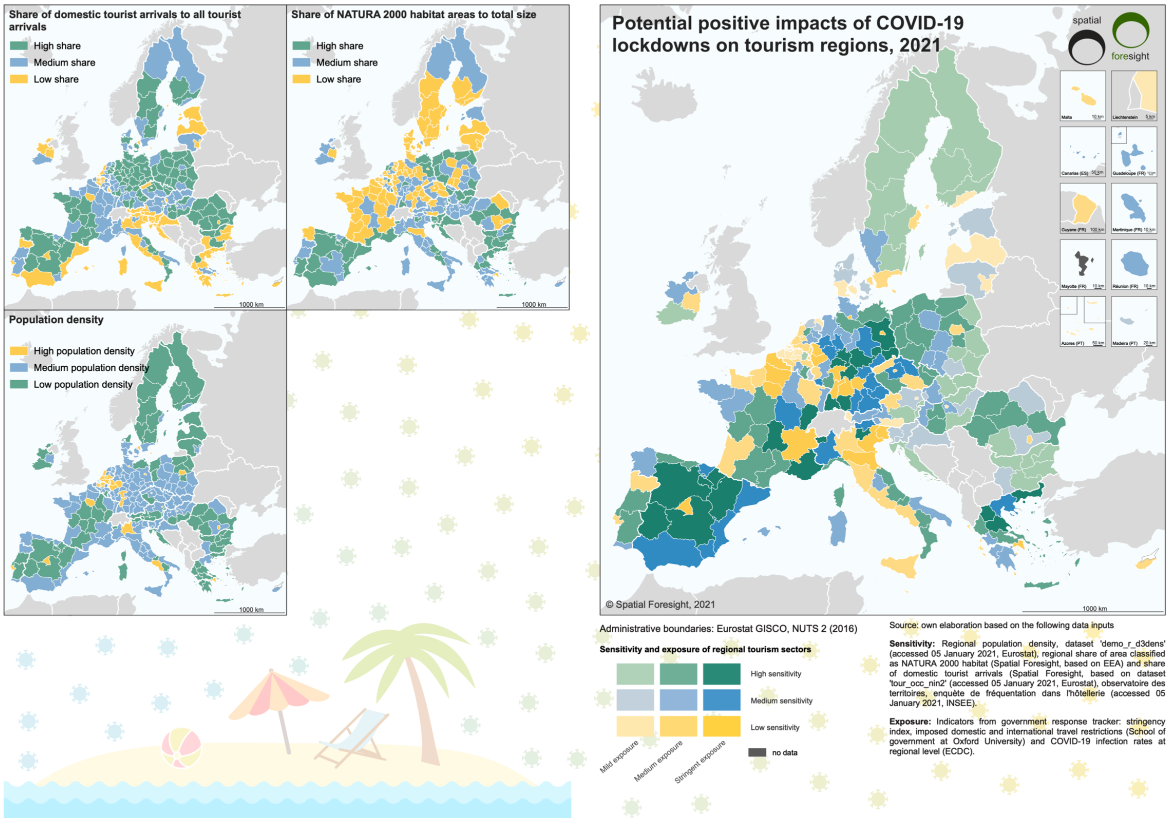
Comme la plupart des touristes n'ont pas pu suivre leurs préférences habituelles en matière de vacances pendant la pandémie, certains ont exploré de nouvelles destinations, souvent plus proches de chez eux et mettant davantage l'accent sur les séjours au sein de leur pays de résidence. Cela signifie que pour certaines régions, la pandémie et les confinements ont apporté un nouveau potentiel touristique. Les caractéristiques des écosystèmes touristiques régionaux sont donc particulièrement pertinentes pour comprendre également les sensibilités positives potentielles aux mesures de confinement. Il s'agit notamment d'une faible densité de population, d'une forte proportion de touristes nationaux et d'un environnement attrayant tel que les zones NATURA 2000.

Les régions où le secteur du tourisme pourrait bénéficier de la pandémie sont celles qui présentent une sensibilité élevée et une faible exposition. Il s'agit de la plupart des régions de Bulgarie, de Finlande et de Suède, ainsi que du Burgenland et de la Styrie en Autriche, de la Prov. Limbourg en Belgique, la Croatie adriatique, les deux régions orientales de la Slovaquie (Stredné Slovensko et Východné Slovensko), les régions orientales de la Pologne (Świętokrzyskie, Lubelskie, Podkarpackie et Podlaskie), l'Olténie du Sud-Ouest (Sud-Vest Oltenia) en Roumanie, ainsi que la Hongrie septentrionale (Észak-Magyarország) et la Grande Plaine du Sud (Dél-Alföld) en Hongrie.

En ce qui concerne les régions de la politique de cohésion pour 2021-27, les régions moins développées et en transition sont plus susceptibles de bénéficier d'effets positifs que les régions plus développées. 56% des régions moins développées et 46% des régions en transition affichent une sensibilité élevée, contre 19% seulement des régions plus développées. Cela est également confirmé par le fait que 49% des régions plus développées présentent une faible sensibilité, alors que c'est le cas pour seulement 12% des régions moins développées et 19% des régions en transition.

Cette analyse ne fournit qu'une approximation grossière des zones ayant un impact positif potentiel. Pour des informations géographiques et une évaluation plus nuancées, les données comparables disponibles sont insuffisantes. Néanmoins, il peut être utile de montrer que la pandémie a également apporté des avantages à certains acteurs du secteur du tourisme. Il n'en reste pas moins que ces impacts positifs potentiels sont de loin dépassés par les impacts négatifs.

Carte 0 -3 Impacts positifs potentiels de la COVID-19 sur les régions touristiques



Source : visuel élaboré par les auteurs

Résilience et préparation

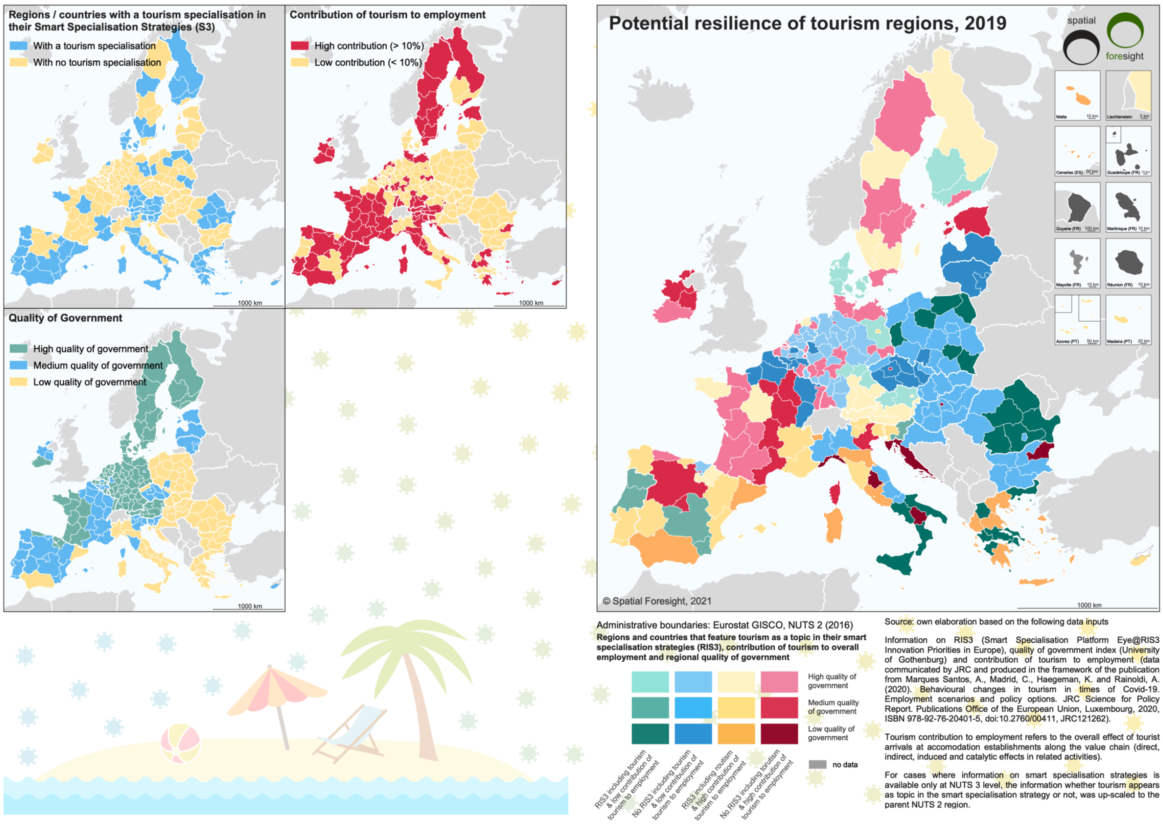
La résilience des écosystèmes touristiques régionaux varie fortement en fonction du modèle touristique d'une région et du poids du tourisme dans l'économie locale et régionale. Les indicateurs de résilience comprennent la diversité des produits touristiques et des groupes cibles, la bonne gouvernance de la région destination, l'ouverture, l'innovation et les possibilités relatives d'accès aux financements et aux ressources.

L'analyse, dont rend compte le graphique suivant, prend en compte la part du tourisme dans l'économie régionale afin de refléter la diversité économique au-delà du tourisme dans une région, la qualité du gouvernement et de la gouvernance en tant que conditions préalables à des stratégies durables de long terme, et à une atmosphère de confiance pour le développement de l'activité, ainsi que les stratégies de recherche et d'innovation pour une spécialisation intelligente (RIS3) concernant le tourisme.

Suivant ce raisonnement, les régions les moins résistantes aux chocs pour le tourisme sont la Croatie adriatique, le nord-est de la Bulgarie, Budapest et les régions italiennes de Ligurie, Basilicate et Ombrie. Ces régions présentent une part comparativement élevée d'emplois dans le secteur du tourisme, une faible qualité de gouvernement et aucune RIS3 incluant le tourisme.

Les potentiels leaders en termes de résilience sont les régions qui présentent des niveaux élevés d'emploi dans le secteur du tourisme, une qualité élevée de gouvernance et une RIS3 traitant du tourisme. Parmi celles-ci figurent les régions touristiques autrichiennes du Tyrol, de Salzbourg, de la Carinthie, du Vorarlberg, du Burgenland, de la Styrie et de Vienne. En outre, de grandes parties de la Bavière et Berlin en Allemagne, le nord de la Finlande, la Frise aux Pays-Bas, ainsi que le Norrland moyen, la Suède occidentale et le Småland et les îles en Suède font partie de ce groupe.

Carte 0 -4 Teaser sur la résilience des régions (touristiques)



Source : visuel élaboré par les auteurs

Principaux enseignements tirés de l'analyse des initiatives politiques

89 initiatives politiques ont été collectées dans le cadre de cette étude, avec une analyse plus détaillée de 16 initiatives. Les résultats sont inclus dans un document annexe au rapport final. L'analyse des initiatives politiques a permis d'identifier quelques leçons en vue du soutien au tourisme dans la nouvelle période de financement de la politique de cohésion de l'UE (2021-2027). Ces leçons permettent de guider les décideurs sur la relance et la préparation de l'avenir des régions touristiques.

Gérer la croissance du tourisme de manière responsable. De plus en plus d'initiatives politiques reflètent la valeur du tourisme pour les économies locales et régionales et tentent d'en augmenter la qualité et l'efficacité ou d'en réduire les effets négatifs sur l'environnement par des mesures politiques spécifiques. La crise de la COVID-19 et la paralysie du tourisme dans de nombreuses régions européennes ont montré comment le tourisme affecte les économies régionales et la vie en général. Il est encore possible de développer des mesures adéquates pour gérer la croissance de l'activité et générer des bénéfices locaux.

De nouvelles destinations émergent. Les destinations rurales moins fréquentées, les parcs nationaux et autres lieux liés à la nature, voire le village à la sortie de la grande ville, ont été les gagnants des loisirs et des voyages pendant la pandémie, principalement pour les visiteurs nationaux. Il est recommandé de construire l'offre touristique sur le patrimoine naturel et culturel des régions, d'assurer l'implication les petits acteurs répartis sur le territoire et d'articuler la gouvernance de l'écosystème touristique pour éviter les effets néfastes de la massification.

Le tourisme doit être durable. De nombreuses initiatives touristiques visent à réduire les effets négatifs des voyages, de l'hébergement, de la restauration et des activités sur l'environnement. Le tourisme doit également devenir plus responsable et plus respectueux du territoire et des communautés locales. La décarbonation du tourisme, dans la mesure du possible, est un objectif de nombreuses stratégies et actions nouvelles. Les approches en termes d'économie circulaire devraient permettre de réduire la quantité de déchets générés par les visiteurs et d'utiliser plus efficacement les ressources. La gestion durable devrait devenir une partie intégrante de la gestion de destination.

La numérisation devient la nouvelle colonne vertébrale du tourisme. Les outils numériques destinés aux touristes et à la gestion de destination s'implantent durablement et vont stimuler la numérisation également dans les domaines non-liés à la santé. Le certificat numérique COVID de l'UE, les certificats de vaccination nationaux et les informations actualisées sur les conditions de voyage sûres deviendront probablement un accessoire de voyage habituel dans les mois et années à venir. Parallèlement, de nombreux organismes de gestion des destinations ont profité de la pause commerciale obligatoire pour développer leurs outils d'information commerciale, leurs systèmes d'aide à la décision, leurs programmes de formation aux compétences numériques, leurs instruments de marketing sur les médias sociaux et leurs réseaux de collaboration en ligne.

La collaboration, l'innovation et les idées créatives sont essentielles. Un état d'esprit novateur et ouvert ainsi que des idées créatives sont nécessaires pour s'adapter au changement et préparer les régions touristiques à l'avenir. Le secteur public, mais aussi les autres acteurs de l'écosystème touristique, doivent être impliqués. Les idées et l'innovation ainsi que les nouveaux partenariats doivent être accélérés. Une meilleure coordination entre les politiques nationales et régionales en matière de tourisme doit être assurée.

Pointeurs politiques

Des combinaisons de politiques appropriées et spécifiques à chaque lieu sont essentielles pour soutenir la reprise du secteur du tourisme tout en se préparant aux changements vers la numérisation et le tourisme durable. Dans l'ensemble, les initiatives régionales qui stimulent le développement local et la collaboration de nombreux partenaires différents au sein de l'écosystème touristique d'une destination sont au cœur de la plupart des initiatives politiques. Pour rendre le tourisme plus résistant aux chocs extérieurs et établir des modèles de tourisme durable, il faut travailler avec des acteurs de l'ensemble de la chaîne de valeur et même, bien souvent, avec des acteurs extérieurs, au-delà des frontières ou de la seule région destination.

Action locale et régionale

L'action locale et régionale au niveau des destinations doit faire de ces dernières des lieux attrayants tant pour les visiteurs que pour les résidents et faire du tourisme un élément important des stratégies plus larges de développement régionale. Les autorités régionales peuvent stimuler la numérisation de leurs secteurs touristiques et veiller à ce que le développement de destination implique tous les acteurs de l'écosystème touristique. Les nouveaux modèles touristiques doivent se concentrer sur le développement de chaînes de valeur locales, de sorte qu'une plus grande partie des bénéfices économiques reste dans la région.

Conformément aux objectifs de la politique 2021-2027, les programmes de la politique de cohésion de l'UE peuvent stimuler la relance du tourisme de plusieurs façons.

Objectif politique 1 - Une Europe plus intelligente : Développer des destinations touristiques intelligentes. Renforcer les acteurs du tourisme en tant que promoteurs de l'innovation. Les stratégies de spécialisation intelligente peuvent contribuer à développer un environnement favorable à l'innovation pour les acteurs du tourisme et impliquer l'ensemble de la chaîne de valeur. La transformation numérique du tourisme joue un rôle pertinent dans de nombreuses initiatives.

Objectif politique 2 - Une Europe plus verte et à faible émission de carbone : Travailler avec l'ensemble de l'écosystème touristique et les autres acteurs (mobilité, producteurs agroalimentaires, production d'énergie, agences de voyage, compagnies de croisière, etc.) du territoire est essentiel pour devenir plus respectueux du climat en tant que destination et en tant que région. Soutenir la conception et la mise en œuvre de stratégies de durabilité dans les destinations touristiques et pour les différents produits touristiques. Des modèles de tourisme plus durables ne peuvent être réalisés que si tous les acteurs concernés travaillent ensemble.

Objectif politique 3 - Une Europe plus connectée : le tourisme durable repose sur des options de transport durables. Cela inclut des modes de déplacement alternatifs (train, bus) qui sont moins intensifs en CO2, ainsi que des infrastructures touristiques cyclables. En outre, la réduction des effets négatifs sur l'environnement du tourisme de croisière et du transport aérien est de nature à rendre le tourisme plus durable.

Objectif politique 4 - Une Europe plus sociale : Le tourisme est un instrument de promotion du développement économique et social local. Le tourisme de santé est un modèle émergent. L'éducation peut avoir un impact direct sur la qualité de l'emploi touristique.

Objectif politique 5 - Une Europe plus proche des citoyens : La valorisation des initiatives ascendantes - qui peuvent s'adjoindre à des projets plus importants - et la création d'espaces et d'opportunités adéquats pour que les initiatives du terrain rencontrent des innovateurs, des experts numériques, des entrepreneurs, des bailleurs de fonds sont essentielles pour garantir que les développements touristiques soient bien ancrés dans les régions.

Action au niveau européen

Une action au niveau européen est nécessaire pour soutenir le redressement vers un tourisme plus résilient, durable et numérique en Europe demandé dans les conclusions du Conseil du 27/05/2021 et déjà partiellement proposé dans la consultation des parties prenantes de la Commission sur le 'parcours de transition pour le tourisme' ('Transition pathway for tourism') (été 2021).

Le marché unique européen du tourisme. Le marché unique européen ne répond pas complètement aux attentes en matière de normes et d'exigences communes dans le domaine du tourisme afin de garantir que les touristes puissent facilement voyager à travers l'UE avec un seul certificat relatif à la COVID-19 et profiter de normes communes de tourisme durable une fois arrivés à destination.

- La sécurité et la fluidité des voyages au sein de l'UE nécessitent davantage de coordination et des normes communes en ce qui concerne les certificats COVID-19 et les droits qui en découlent.

- Le tourisme durable dans l'UE nécessite des normes et des systèmes de certification communs pour le secteur de l'hôtellerie. Dans le meilleur des cas, il ne s'agirait pas d'un nouveau certificat mais de l'adaptation de normes et de certificats internationaux existants.

Table(s) ronde(s) européenne(s) sur le tourisme. Le tourisme est une activité horizontale et dépend de la collaboration d'un large éventail d'acteurs. Pour renforcer le tourisme dans la sphère politique européenne, un certain nombre de tables rondes sur le tourisme pourraient être utiles.

- Une table ronde interservices européenne pourrait servir de plateforme pour mieux coordonner les politiques, les initiatives et les outils de soutien de l'UE qui affectent les destinations et les industries touristiques dans toutes les DG concernées.

- Une table ronde avec les programmes du FEDER, du FC, du FSE et du FEADER concernant le tourisme, par exemple dans le contexte du Comité de Coordination sur les fonds européens structurels et d’investissement et du Groupe d’expert sur les fonds européens structurels et d’investissement pourrait renforcer les approches mutualisées pour soutenir le tourisme dans le cadre de la politique de cohésion. Les acteurs de la facilité pour la reprise et la résilience (FRR) devraient également y être inclus.

- Une table ronde européenne public-privé sur le tourisme pourrait réunir des acteurs clés de la sphère de l'élaboration des politiques publiques et des représentants de divers segments de l'industrie du tourisme en Europe et relier des actions importantes, telles que l'Observatoire virtuel du tourisme, aux besoins des régions et des décideurs.

La connaissance du tourisme européen. Tant en ce qui concerne les statistiques du tourisme européen au niveau régional que les plates-formes de suivi des politiques touristiques, de nouveaux développements sont possibles.

- Eurostat collecte certaines statistiques comparables sur le tourisme au niveau régional. Toutefois, pour mieux éclairer la prise de décision, une collecte conjointe de données sur un ensemble plus large d'indicateurs communs est nécessaire.

- À l'instar des centres de connaissances du *EU Science Hub*, une plateforme européenne de suivi des progrès du tourisme durable au niveau régional pourrait être mise en place pour recueillir des informations sur les stratégies de tourisme intelligent.

Le rapport final se termine par des **enseignements** plus **spécifiques pour les différents types de régions touristiques**, soulignant la nécessité de surmonter les effets négatifs de la massification et de la dépendance à l'égard d'acteurs de l'industrie du voyage extérieurs à la région par des modèles et des approches touristiques qui renforcent la région de destination et favorisent l'engagement de la communauté. Les nouvelles mesures doivent garantir que les activités touristiques génèrent davantage de valeur et de respect pour le territoire. La durabilité doit être gérée pour la destination dans son ensemble, les solutions ne doivent pas être laissées aux initiatives individuelles ou aux projets pilotes.

Prises conjointement, les actions à tous les niveaux, du local à l'européen, doivent œuvrer à la décarbonation et à la réduction des effets négatifs du tourisme sur l'environnement. La numérisation et l'innovation seront inévitables en tant qu'outils pour redresser les régions de destination et les industries touristiques et les rendre plus résilientes et durables. En outre, le tourisme doit être considéré comme un élément important de l'aménagement du territoire et doit être en contact permanent avec d’autres politiques sectorielles telles que celles concernant les transports, les infrastructures et équipements numériques, la gestion de l'eau et des déchets, l'énergie, les espaces et infrastructures publics. Une bonne gouvernance et la collaboration d'un large éventail d'acteurs sont nécessaires aux niveaux des régions de destination, des États membres et de l'UE, ainsi qu'au-delà des frontières, dans le contexte d'Interreg.

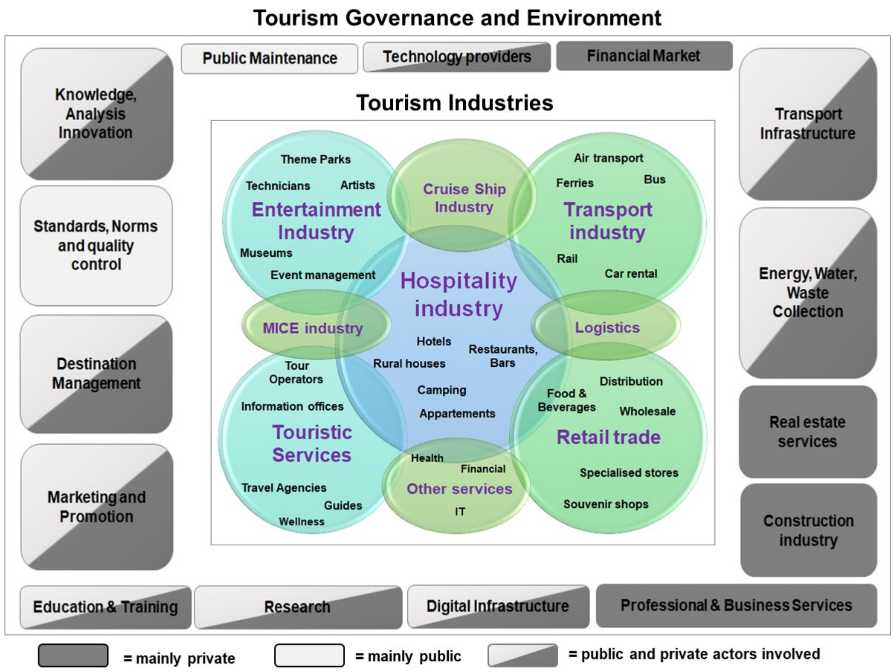
Zusammenfassung

Diese Zusammenfassung bezieht sich auf den Abschlussbericht zu einer Studie, die 2020/2021 die regionalen Auswirkungen der COVID-19-Krise auf den Tourismussektor untersucht hat. Die Studie wurde von Spatial Foresight in Zusammenarbeit mit t33, AnySolution und NECSTouR für die GD REGIO durchgeführt. Die Studie bewertet, wie verschiedene Tourismusregionen von der COVID-19-Krise betroffen sind und zeigt auf welche zukünftigen Entwicklungen möglich sind. Sie kombiniert die Analyse der territorialen Vielfalt und der wirtschaftlichen Bedeutung des Tourismus mit den territorial unterschiedlichen Auswirkungen der COVID-19-Pandemie. Es gibt auch eine zeitliche Dimension, denn die Auswirkungen unterscheiden sich territorial zwischen dem, was wir bisher gesehen haben, und dem, was kurz- und mittelfristig zu erwarten ist. Auf der Grundlage der Erkenntnisse über die Auswirkungen der Pandemie und der Lehren aus den politischen Reaktionen wurden politische Empfehlungen entwickelt, um den Tourismusregionen bei der Anpassung an die Zukunft zu helfen und den EU-Tourismus auf seinem Weg zu Nachhaltigkeit und Widerstandsfähigkeit zu begleiten.

Das Ökosystem des Tourismus in Europa

Der Tourismus ist ein wichtiger Teil der europäischen Wirtschaft, an dem 3 Millionen Unternehmen beteiligt und 22,6 Millionen Menschen beschäftigt sind (11 % der EU-Gesamtbeschäftigung) und der 9,5 % des BIP der EU (2019) ausmacht. Tourismusaktivitäten sind im Allgemeinen arbeitsintensiv und wirken sich stärker auf die Beschäftigung als auf die Wertschöpfung aus. Insgesamt hat der Tourismus im Vergleich zu anderen Industrie- oder Dienstleistungssektoren eine niedrige Produktivität. Mehr als in anderen Sektoren sind KMU, insbesondere Kleinstunternehmen, vorherrschend. Saisonabhängigkeit und geringe Qualität der Beschäftigung sind ein Problem in den einschlägigen Teilsektoren (z. B. Beherbergung, Gastronomie). Der Tourismus ist die viertgrößte Exportkategorie der EU und bringt Spillover-Vorteile für die europäische Wirtschaft als Ganzes: 1 EUR an Wertschöpfung, die durch den Tourismus generiert wird, führt zu einer zusätzlichen Wertschöpfung von 0,56 EUR in anderen Branchen.

Abbildung 0.1 Das Ökosystem des Tourismus



Hinweis: MICE beschreibt Aktivitäten im Zusammenhang mit Geschäftstreffen, Incentives, Kongressen und Ausstellungen/Veranstaltungen.

Quelle: Eigene Erarbeitung

Das Tourismus Ökosystem umfasst eine breite Palette an Sektoren, die direkt oder indirekt vom Tourismus betroffen sind, insbesondere in Regionen mit vielen Besuchern oder wichtigen Verkehrsknotenpunkten. Neben dem Beherbergungs- und Gaststättengewerbe und den touristischen Dienstleistungen gehören dazu vor allem Verkehrsdienstleistungen, der Einzelhandel, die Agrar- und Ernährungswirtschaft, die Unterhaltungs- und Kulturindustrie, aber auch die allgemeine und berufliche Bildung, freiberufliche und gewerbliche Dienstleistungen sowie der Immobiliensektor. Tourismusaktivitäten sind auch stark mit öffentlichen Infrastrukturen wie Verkehr, Wasserversorgung und Abwasserentsorgung, Abfallentsorgung, aber auch technologischer und digitaler Infrastrukturen verknüpft. All diese Verflechtungen führen dazu, dass touristische Aktivitäten einen großen Einfluss auf Kommunen und Regionen haben. Die Verbindung zum Territorium, die Abhängigkeit von den natürlichen Bedingungen (z. B. Wetter, Jahreszeit) und die wechselnde Kombination von Dienstleistungen machen jede Reise und jedes Tourismuserlebnis mehr oder weniger einzigartig, auch wenn Dienstleistungen wie Unterkunft, Transport und Verpflegung ähnlich und sogar standardisiert sind.

Die negativen Folgen des Tourismus aufgrund von Umweltauswirkungen, Druck auf die natürlichen Ressourcen oder Überlastung und steigende Immobilienpreise aufgrund von Übertourismus erfordern zunehmend eine anpassungsfähigere Planung und Steuerung des Tourismus innerhalb nachhaltiger und verantwortungsvoller Grenzen. Er ist auch einer der Sektoren, die am stärksten von COVID-19 betroffen sind, sowohl kurzfristig als auch mittel- bis langfristig.

Tourismustrends

Buchungs- und Reisesuchindikatoren deuten darauf hin, dass sich die Reisetätigkeit in den kommenden Monaten nicht vollständig erholen wird, und die meisten Experten gehen davon aus, dass diese erst in einigen Jahren wieder das Niveau von 2019 erreichen wird. In einigen Segmenten - insbesondere bei Geschäftsreisen - könnte es noch länger weniger Aktivität geben, da sich andere Lösungen wie z.B. Videokonferenzen immer mehr durchgesetzt haben.

In naher Zukunft werden Reisen und Tourismus mit neuen Vorsichtsmaßnahmen, Ängsten und zusätzlichem Verwaltungsaufwand verbunden sein. Die COVID-19-Pandemie wird die Entwicklungen und Trends im Tourismus noch einige Jahre lang prägen. COVID-19-Beschränkungen und Unsicherheiten dominieren die Trends für 2021/22 und werden noch einige Jahre lang eine Rolle im Tourismussektor spielen. In den nächsten Jahren werden sie von Trends abgelöst, die mit den Verhaltensänderungen im Zuge der COVID-19-Pandemie zusammenhängen. Mittelfristig, d. h. bis zum Jahr 2030, werden die Trends aus der Zeit vor der Pandemie wieder in den Vordergrund rücken. Bis dahin werden voraussichtlich Trends im Zusammenhang mit der Digitalisierung und nachhaltigem Tourismus dominieren.

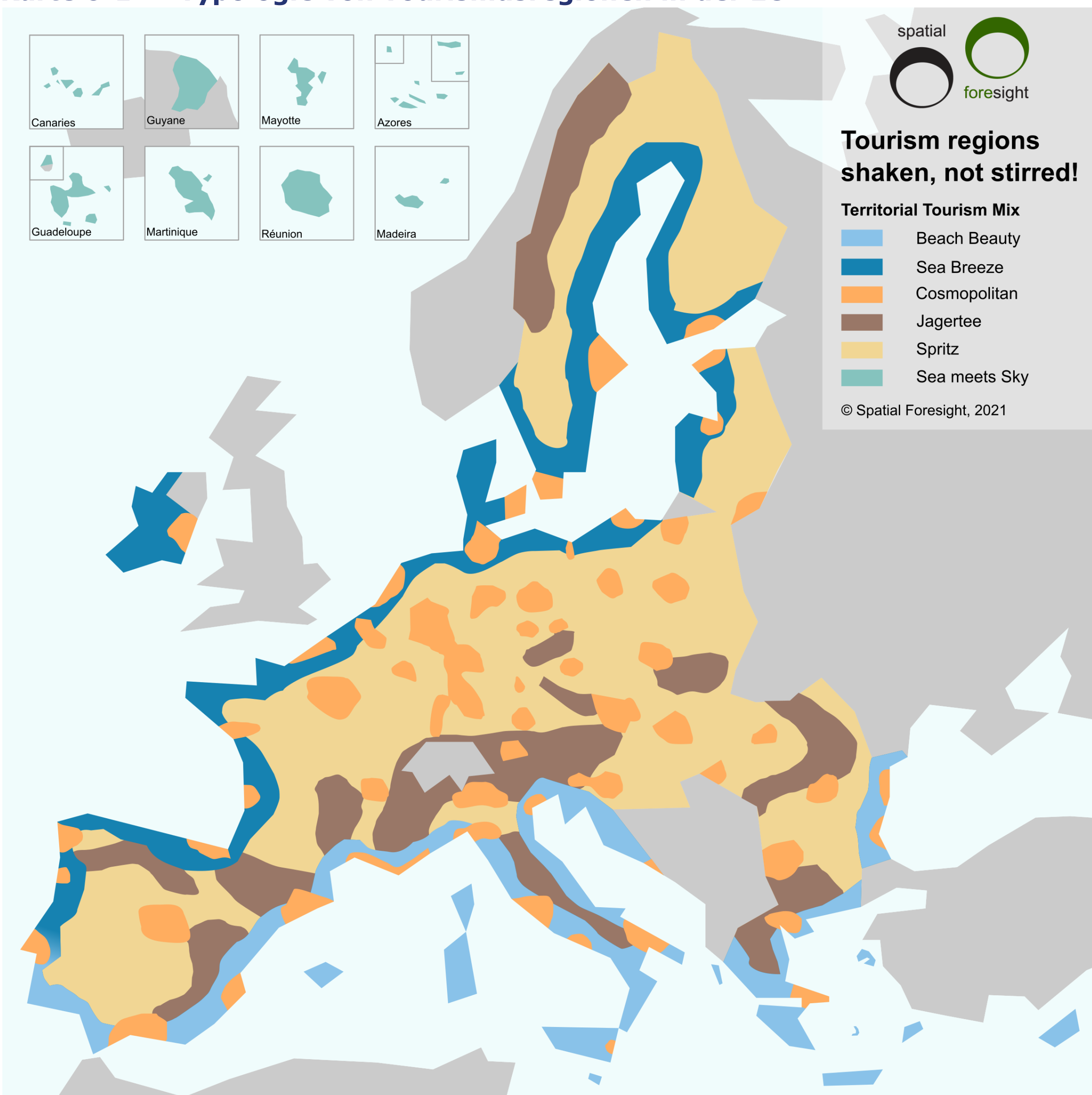
Die Tourismustrends wirken sich in den verschiedenen Arten von Reisezielen unterschiedlich aus. Günstige Ausgangspositionen für eine wachsende Zahl von Tagestouristen haben vor allem die großen Ballungsräume und deren größere Einzugsgebiete in Europa. Für einen nachhaltigeren und umweltfreundlicheren Tourismus gibt es günstige Ausgangspositionen entlang der wichtigsten Hochgeschwindigkeits-Eisenbahnlinien und Nachtzugverbindungen in Europa, die eine umweltfreundliche Anreise zum Zielort ermöglichen. Darüber hinaus haben Gebiete mit einem niedrigen Pro-Kopf-Touristenaufkommen eine bessere Ausgangsposition, da ihre Tragfähigkeit noch einen nachhaltigeren Tourismus zulässt. Die Digitalisierung im Tourismus hat dort eine gute Ausgangsposition, wo die häufige Nutzung digitaler Mittel zur Kommunikation mit Behörden oder zum Einkaufen üblich ist.

EU Tourismusregionen und Folgen von COVID-19

Um die Auswirkungen der COVID-19-Pandemie auf die EU-Regionen zu verstehen, ist es wichtig, mehr darüber zu wissen, welche Rolle der Tourismus in den einzelnen Regionen spielt. Auf regionaler EU-Ebene schwankt die Beschäftigung im Tourismus zwischen 66 % in der Südägäis in Griechenland und nur 2 % in Mazowiecki, der Region um Warschau in Polen. In 87 EU-Regionen entfallen mehr als 12 % der Arbeitsplätze auf den Tourismus. Dabei handelt es sich vor allem um Regionen rund um das Mittelmeer, um Regionen in Portugal, Spanien und Frankreich, aber auch um Regionen jenseits des Mittelmeers, in den Alpen, den Küstengebieten Belgiens, der Niederlande und Deutschlands, Estland, Finnland und Schweden.

Regionale Unterschiede bestehen je nach Geografie und Klima, Verkehrs- und Unterkunftsmustern, Saisonabhängigkeit, Herkunft der Touristen und wirtschaftlicher Abhängigkeit vom Tourismussektor. Alle Faktoren sind wichtig, um die Vielschichtigkeit der Tourismusregionen in Europa zu verstehen. Der Tourismus findet auf der Ebene von (meist räumlich begrenzten) Reisezielen statt, was es schwierig macht, eine regionale (NUTS2-basierte) Typologie der Tourismusregionen in Europa zu erstellen. Eine große NUTS-2-Region wie Andalusien in Spanien beispielsweise kombiniert verschiedene Arten von Tourismus mit unterschiedlichen Tourismusprodukten (z. B. Sonne und Strand, städtisch/kulturell, ländlich/naturnah/aktiv, Berge/Skifahren).

Karte 0-1 Typologie von Tourismusregionen in der EU



Quelle: Eigene Erarbeitung

In dieser Studie wurden die einzelnen Teile zu einem umfassenden Bild zusammengefügt. Die Bedeutung des Tourismus für die regionale Beschäftigung und die Herkunft der Touristen pro EU-Region wurden als Ausgangspunkte verwendet. Die Hinzufügung qualitativer Merkmale zu den quantitativen Kennzeichen ermöglichte ein differenzierteres Verständnis. In einer kombinierten quantitativen und qualitativen Klassifizierung der europäischen Tourismusregionen wurden sechs Haupttypen ermittelt und nach typischen Urlaubsgetränken benannt: 'Beach Beauty', 'Jagertee', 'Sea Breeze', 'Spritz', 'Sea meets Sky' und 'Cosmopolitan' (siehe Karte 0.1). Auf der NUTS2-Ebene sind die Regionen selten nur mit einem Tourismustyp verbunden, aber die Klassifizierung kann ihnen helfen, über ihr Tourismusmodell nachzudenken.

- **Tourismustyp „Beach Beauty'**: Europäische Küstenregionen, insbesondere rund um das Mittelmeer, mit vielen Touristen, die sich besonders auf Sonne und Strand freuen. Hotels sind die vorherrschende Unterkunftsart, während der Flugverkehr die bevorzugte Art der Anreise ist.

- **Tourismus-Typ „Jagertee"**: Tourismusregionen in den Bergen, die sich auf natürliche und sportliche Aktivitäten konzentrieren, vor allem Skifahren im Winter und Wandern im Sommer. Vor allem in den Alpen, aber auch in anderen Gebirgsregionen.

- **Tourismus-Typ „Sea Breeze“**: Ländlicher Tourismus in Küstenregionen mit einem hohen Anteil an Inlandstourismus. Die Anreise erfolgt meist mit dem Auto und die Unterbringung erfolgt in Ferienhäusern, Landhäusern oder auf Campingplätzen. Beispiele: Nordische und baltische Länder, aber auch in Deutschland, den Niederlanden und Irland.

- **Tourismus-Typ „Spritz"**: Ländliche und/oder gebirgige Binnenregionen in Europa, die weniger dicht besiedelt sind und über ein reiches Kultur- und Naturerbe verfügen. Viele von ihnen liegen in oder in der Nähe von Natur- und Schutzgebieten.

- **Tourismustyp „Sea meets Sky"**: Die EU-Regionen in äußerster Randlage stellen eine besondere Form von Tourismusregionen dar, die Sonne und Strand mit ländlichem/natürlichem und städtischem/kulturellem Tourismus kombinieren.

- **Tourismus-Typ „Cosmopolitan"**: Europäische Städtetourismusregionen bieten Aktivitäten wie Shopping, kulturelle Veranstaltungen, Attraktionen wie Kulturerbe, Museen und Sehenswürdigkeiten, aber auch Geschäftsreisen, Veranstaltungen und Konferenzen.

Im Jahr 2020 hat die COVID-19-Pandemie dem Tourismus ein jähes Ende gesetzt und zu einem noch nie dagewesenen Rückgang geführt. Der Tourismus ist möglicherweise der Sektor, der am stärksten von den Folgen der COVID-19-Pandemie betroffen ist. Im Oktober 2020 schätzte die OECD den Rückgang des internationalen Tourismus auf etwa 80 %. Die konkreten Auswirkungen sind jedoch von Region zu Region unterschiedlich. Der Städtetourismus und der Küstentourismus im Mittelmeerraum verzeichneten die stärksten Einbrüche. Der Städtetourismus ging 2020 immens zurück, wobei es erhebliche Unterschiede zwischen den einzelnen städtischen Gebieten gab (z. B. -80 % in Dublin oder -55 % in Hamburg). Am stärksten betroffen waren Reiseziele, die weitgehend vom Flugverkehr und vom internationalen Tourismus abhängig sind. Dagegen waren viele Küstenregionen mit starken Binnenmärkten und ländliche Tourismusregionen weniger stark betroffen. Trotz einer gewissen Erholung seit dem Sommer 2021 sind die Auswirkungen der neuen COVID-19-Reiseregelungen und bestehender Ängste auf den Reiseverkehr auch in der Sommersaison 2021 zu spüren. Zwar stiegen die Touristenzahlen europaweit wieder an - nicht zuletzt dank der Impfungen -, aber Unsicherheiten und Einschränkungen des sicheren und reibungslosen Reisens blieben für viele Menschen bestehen.

Im Hinblick auf die in dieser Studie definierten Typen von Tourismusregionen ergab sich ein breites Spektrum unterschiedlicher COVID-19 Auswirkungen auf den Tourismus. Insgesamt weisen die Regionen mit den Tourismustypen "Beach Beauty" und "Cosmopolitan" den stärksten Rückgang der Besucherzahlen und schwerwiegende negative Auswirkungen in den Bereichen Beherbergung, Gastronomie und Tourismusaktivitäten auf. Nur ein geringer Anteil der üblichen internationalen und EU-Touristen konnte durch Inlandstourismus ersetzt werden. Aufgrund der teilweisen Öffnung profitierten die Regionen mit den Tourismustypen "Jagertee" und "Sea Breeze" im Sommer 2020 von einem Anstieg der Reisetätigkeit (meist inländisch). Die auf Wintertourismus ausgerichteten "Jagertee"-Regionen litten dann unter den Schließungen im Winter 2020/21 und dem fast vollständigen Verlust von Besuchern und Geschäften in den Winter- und Frühjahrsmonaten 2021. Regionen mit einem eher ländlichen und naturnahen "Spritz"-Tourismus waren diejenigen, die weniger negative Auswirkungen zu spüren bekamen, und einige Urlaubsarten wie Camping oder Ferienhäuser konnten ihr Geschäft während der Pandemie sogar steigern.

Mögliche negative Auswirkungen von COVID-19

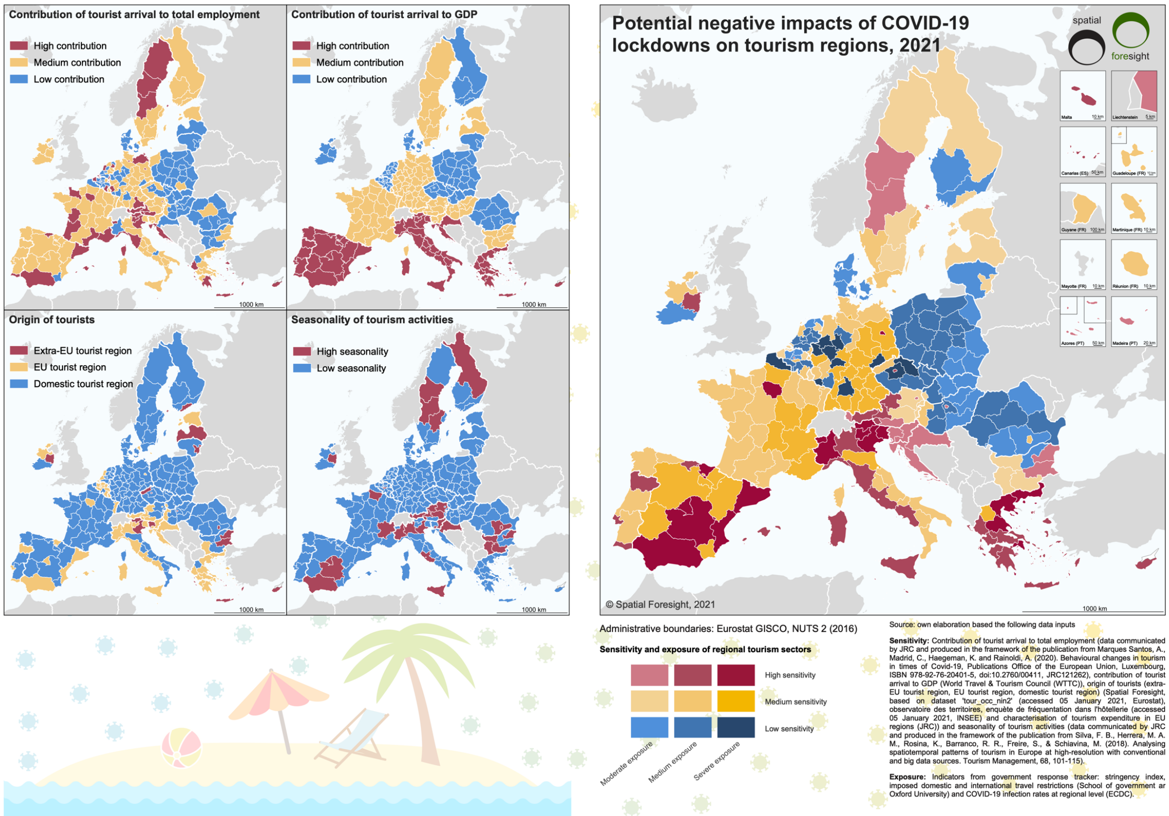
Um die regionale Vielfalt der Auswirkungen der COVID-19-Pandemie zu verstehen, muss zwischen Betroffenheit und Empfindlichkeit unterschieden werden. In Anlehnung an den Ansatz der territorialen Folgenabschätzung (Böhme & Besana, 2020; ESPON, 2013; Essig & Kaucic, 2017; Gaugitsch et al., 2020) liefert die Analysemethode eine grobe Momentaufnahme der Betroffenheit und Empfindlichkeit der europäischen Regionen gegenüber COVID-19-Pandemiemaßnahmen.

Diesem Ansatz folgend wurden die regionalen Volkswirtschaften in Europa analysiert, um eine erste Einschätzung der Regionen zu erhalten, die stärker von COVID-19-Sperrungen und Reisebeschränkungen betroffen sind. Dies betrifft sowohl regionale Unterschiede bei den verheerenden negativen Auswirkungen als auch bei den möglichen positiven Effekten.

Wie stark sich Lockdown-Maßnahmen und Reisebeschränkungen auf die lokale und regionale Entwicklung auswirken, hängt von der Empfindlichkeit eines Ortes für diese Maßnahmen ab. Im Zusammenhang mit territorialen Folgenabschätzungen wird die Empfindlichkeit als das Ausmaß verstanden, in dem die regionale Entwicklung aufgrund spezifischer regionaler Merkmale und Ausstattungen beeinträchtigt wird. Die strukturellen Merkmale regionaler Tourismusökosysteme sind daher besonders wichtig, um mögliche negative Empfindlichkeiten gegenüber Sperrungen und Einschränkungen zu verstehen. Zu diesem Zweck wurden die folgenden Aspekte berücksichtigt: Beitrag des Tourismus zur regionalen Beschäftigung, Beitrag des Tourismus zum BIP (national), Anteil der EU- und Nicht-EU-Touristen (Abhängigkeit von ausländischen Touristen) und Hochsaisonalität mit Schwerpunkt auf Winter und Frühjahr, da für diese Regionen zwei verlorene Saisons auf dem Spiel stehen.

Bei den potenziell am stärksten betroffenen Regionen, d. h. den Regionen mit hoher Empfindlichkeit und hoher Betroffenheit, handelt es sich um eine Mischung aus großen städtischen Reisezielen, einschließlich der Hauptstadtregionen Athen, Berlin, Madrid und Paris, und Reisezielen vor allem in Südeuropa und den Alpen; insbesondere Regionen auf der iberischen Halbinsel und in Italien sowie Zentralmazedonien in Griechenland und Zypern sind aufgrund ihrer Abhängigkeit vom Tourismus in Bezug auf BIP und Beschäftigung betroffen. Weite Teile Ost- und Nordwesteuropas sind hingegen weniger betroffen, da der Tourismus in den regionalen Volkswirtschaften eine geringere Rolle spielt. Dies spiegelt sich auch in der Empfindlichkeit der verschiedenen Arten von Regionen der Kohäsionspolitik 2021-27 wider. Während etwa 45 % der weniger entwickelten Regionen eine geringe Empfindlichkeit aufweisen, zeigen 45 % der stärker entwickelten Regionen und 63 % der Übergangsregionen eine mittlere Empfindlichkeit. Etwa ein Drittel der stärker und der weniger stark entwickelten Regionen weisen eine hohe Empfindlichkeit auf, während dies nur auf 15 % der Übergangsregionen zutrifft.

Karte 0-2 Mögliche negative Auswirkungen von COVID-19 auf Tourismusregionen



Quelle: Eigene Erarbeitung

Mögliche positive Auswirkungen von COVID-19

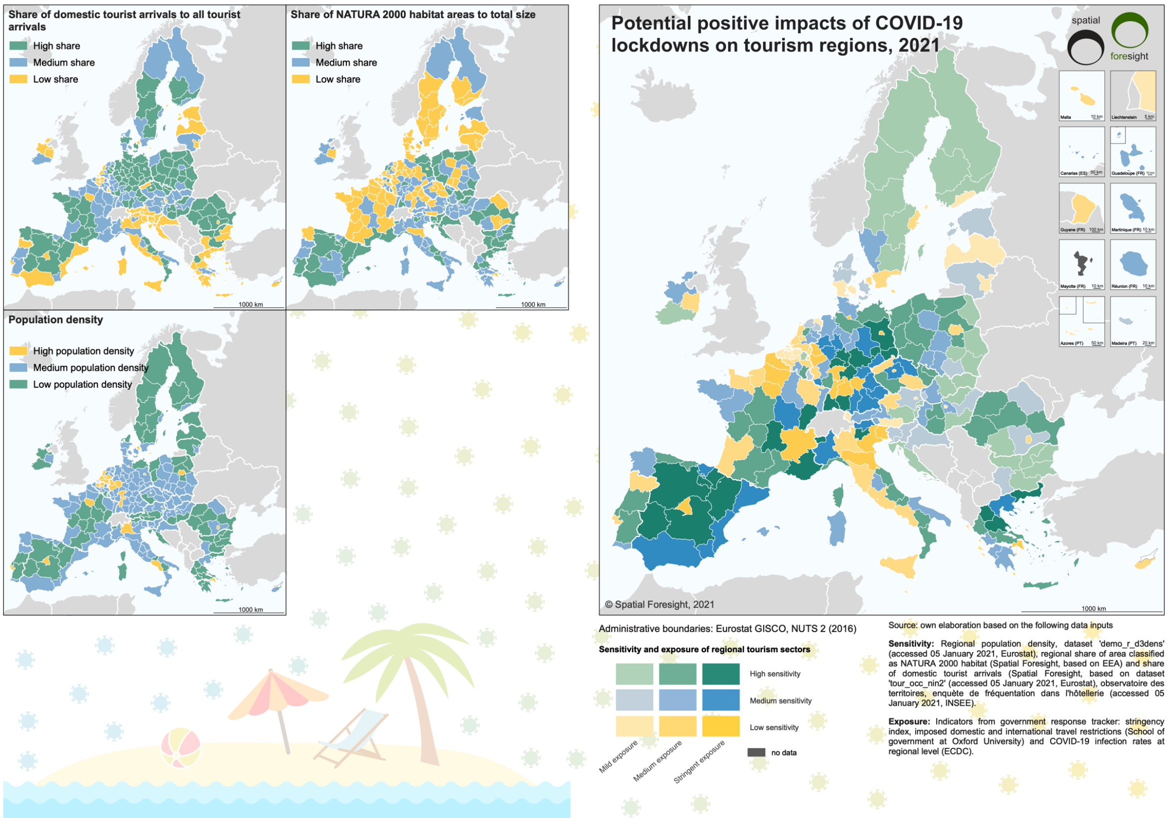
Da die meisten Touristen während der Pandemie ihren gewohnten Urlaubsvorlieben nicht nachgehen konnten, erkundeten einige neue Reiseziele, die oft näher an ihrem Heimatort lagen und bei denen der Schwerpunkt stärker auf Inlandsreisen lag. Dies bedeutete, dass die Pandemie und die Schließungen für einige Regionen ein neues touristisches Potenzial mit sich brachten. Die Merkmale regionaler Tourismus-Ökosysteme sind daher besonders wichtig, um auch potenzielle positive Empfindlichkeiten gegenüber den Einschränkungsmaßnahmen zu verstehen. Dazu gehören eine geringe Bevölkerungsdichte, ein hoher Anteil an Inlandstouristen und eine attraktive Umwelt wie NATURA-2000-Gebiete.

Die Regionen, in denen der Tourismussektor von der Pandemie profitieren könnte, sind die Regionen mit hoher Empfindlichkeit und geringer Betroffenheit. Dazu gehören die meisten Regionen in Bulgarien, Finnland und Schweden sowie das Burgenland und die Steiermark in Österreich, die Prov. Limburg in Belgien, Kroatien an der Adria, die beiden östlichen Regionen der Slowakei (Stredné Slovensko und Východné Slovensko), die östlichen Regionen in Polen (Świętokrzyskie, Lubelskie, Podkarpackie und Podlaskie), Sud-Vest Oltenia in Rumänien sowie Nordungarn (Észak-Magyarország) und die südliche Tiefebene (Dél-Alföld) in Ungarn.

In Bezug auf die Regionen der Kohäsionspolitik 2021-27 ist es wahrscheinlicher, dass weniger entwickelte Regionen und Übergangsregionen von den positiven Auswirkungen profitieren als stärker entwickelte Regionen. 56 % der weniger entwickelten Regionen und 46 % der Übergangsregionen weisen eine hohe Empfindlichkeit auf, während dies nur 19 % der stärker entwickelten Regionen tun. Dies wird auch dadurch bestätigt, dass 49 % der stärker entwickelten Regionen eine geringe Empfindlichkeit aufweisen, während dies nur auf 12 % der weniger entwickelten Regionen und 19 % der Übergangsregionen zutrifft.

Diese Analyse bietet nur einen groben Anhaltspunkt für Gebiete mit potenziell positiven Auswirkungen. Für differenziertere geografische Informationen und Bewertungen sind nicht genügend vergleichbare Daten verfügbar. Dennoch kann sie dazu beitragen, das Bewusstsein dafür zu schärfen, dass die Pandemie für einige Akteure des Tourismussektors auch Vorteile brachte. Diese potenziellen positiven Auswirkungen werden jedoch bei weitem von den negativen Auswirkungen überwogen.

Karte 0-3 Mögliche positive Auswirkungen von COVID-19 auf Tourismusregionen



Quelle: Eigene Erarbeitung

Widerstands- und Reaktionsfähigkeit

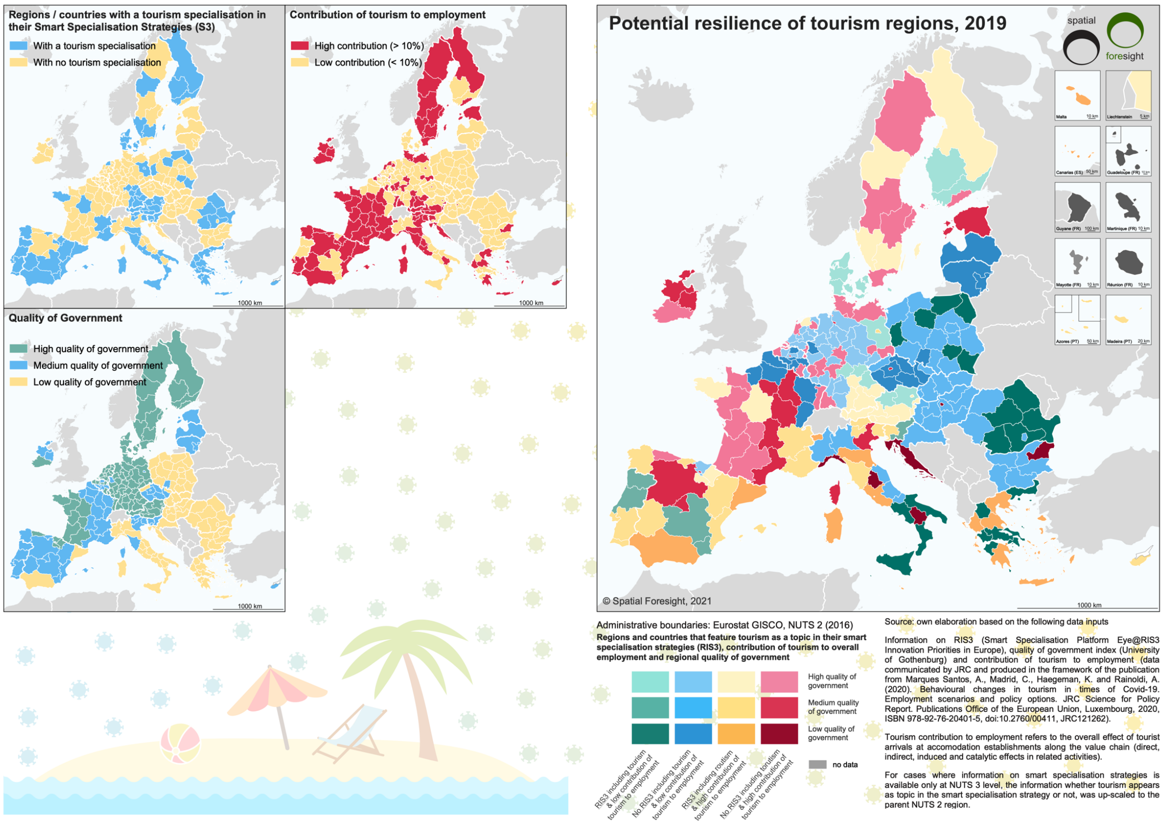
Die Widerstandsfähigkeit regionaler Tourismus-Ökosysteme ist je nach Tourismusmodell in einem Gebiet und dem Gewicht des Tourismus in der lokalen und regionalen Wirtschaft sehr unterschiedlich. Zu den Anhaltspunkten für die Widerstandsfähigkeit gehören die Vielfalt der touristischen Produkte und Zielgruppen, eine gute Governance des Reiseziels, Offenheit, Innovation und Zugang zu Finanzmitteln und Ressourcen.

Die Analyse, die in der Karte dargestellt ist, berücksichtigt den Anteil des Tourismus an der regionalen Wirtschaft, um die wirtschaftliche Vielfalt über den Tourismus hinaus in einer Region widerzuspiegeln, die Qualität von Regierung und Verwaltung als Voraussetzung für langfristige, nachhaltige Strategien, soziales Vertrauen und Legitimität sowie Forschungs- und Innovationsstrategien für intelligente Spezialisierung (RIS3), die sich mit dem Tourismus befassen.

Diesem Grundgedanken folgend sind die Regionen mit der geringsten Widerstandsfähigkeit gegenüber Schocks im Tourismus das adriatische Kroatien, Nordost-Bulgarien, Budapest und die italienischen Regionen Ligurien, Basilicata und Umbrien. Diese Regionen haben einen vergleichsweise hohen Beschäftigungsanteil im Tourismus, aber eine niedrige Regierungsqualität und keine RIS3 für den Tourismus.

Die potenziellen Stars in Bezug auf die Widerstandsfähigkeit sind Regionen mit einem hohen Beschäftigungsanteil im Tourismus, einer hohen Qualität der Verwaltung und einer RIS3, die sich mit dem Tourismus befasst. Dazu gehören die österreichischen Tourismusregionen Tirol, Salzburg, Kärnten, Vorarlberg, Burgenland, Steiermark und Wien. Außerdem gehören große Teile Bayerns und Berlins in Deutschland, Nordfinnland, Friesland in den Niederlanden sowie Mittel-Norrland, Westschweden und Småland & Inseln in Schweden zu dieser Gruppe.

Karte 0-4 Teaser über die Widerstandsfähigkeit von (Tourismus-)Regionen



Quelle: Eigene Erarbeitung

Lehren aus der Analyse der politischen Initiativen

Im Rahmen dieser Studie wurden 89 Initiativen zur Unterstützung des Tourismus identifiziert, wobei 16 Initiativen genauer analysiert wurden. Die Ergebnisse sind in einem Anhang zum Abschlussbericht enthalten. Die Analyse der politischen Initiativen ermöglichte es, einige Lehren im Hinblick auf die bevorstehende Unterstützung des Tourismus im neuen Finanzierungszeitraum der EU-Kohäsionspolitik (2021-2027) zu ziehen. Sie sollen den Entscheidungsträgern bei der Vorbereitung auf die Zukunft der Tourismusregionen helfen.

Das Wachstum des Tourismus verantwortungsvoll steuern. Immer mehr politische Initiativen spiegeln den Wert des Tourismus für die lokale und regionale Wirtschaft wider und versuchen, entweder die Qualität und Effektivität zu steigern oder die negativen Umweltauswirkungen durch spezifische politische Maßnahmen zu verringern. Die COVID-19-Krise und der Stillstand des Tourismus in vielen europäischen Regionen haben gezeigt, wie der Tourismus die regionale Wirtschaft und das Leben im Allgemeinen beeinflusst. Es gibt noch Spielraum für die Entwicklung geeigneter Maßnahmen zur Steuerung des Wachstums und zur Schaffung lokaler Vorteile.

Neue Reiseziele entstehen. Weniger überlaufene ländliche Reiseziele, Nationalparks und andere naturnahe Orte, ja sogar das Dorf vor den Toren der Großstadt waren während der Pandemie die Gewinner des Freizeit- und Reiseverkehrs, vor allem für inländische Besucher. Es wird empfohlen, das touristische Angebot auf dem natürlichen und kulturellen Erbe der Regionen aufzubauen, die kleinen, über das gesamte Gebiet verteilten Akteure einzubinden und die Steuerung des touristischen Ökosystems zu artikulieren, um schädliche Auswirkungen der Massifizierung zu vermeiden.

Tourismus muss nachhaltig sein. Viele Tourismusinitiativen zielen darauf ab, die negativen Auswirkungen von Reisen, Unterbringung, Verpflegung und Aktivitäten auf die Umwelt zu verringern. Der Tourismus muss auch verantwortungsvoller und respektvoller gegenüber der Bevölkerung und den lokalen Gemeinschaften werden. Die weitestgehende Dekarbonisierung des Tourismus ist ein Ziel vieler neuer Strategien und Maßnahmen. Zirkuläre Ansätze sollten dazu beitragen, die von den Besuchern verursachte Abfallmenge zu verringern und die Konzepte für eine effizientere Ressourcennutzung zu verbessern. Nachhaltigkeitsmanagement sollte ein Teil des Destinationsmanagements werden.

Digitalisierung wird das neue Rückgrat des Tourismus. Digitale Werkzeuge für Touristen und das Destinationsmanagement sind auf dem Vormarsch und werden die Digitalisierung auch in nicht gesundheitsbezogenen Bereichen vorantreiben. Das digitale COVID-Zertifikat der EU, nationale Impfbescheinigungen und aktuelle Informationen über sichere Reisebedingungen werden wahrscheinlich in den nächsten Monaten und Jahren zu einem üblichen Reisezubehör werden. Gleichzeitig haben viele Destinationsmanagement-Organisationen die obligatorische Geschäftspause genutzt, um ihre Marktintelligenz-Tools, Entscheidungsunterstützungssysteme, Schulungsprogramme für digitale Kompetenzen, Social-Media-Marketinginstrumente und Online-Kollaborationsnetzwerke weiterzuentwickeln.

Zusammenarbeit, Innovation und kreative Ideen sind unerlässlich. Eine innovative und offene Denkweise sowie kreative Ideen sind erforderlich, um sich an den Wandel anzupassen und die Tourismusregionen auf die Zukunft vorzubereiten. Nicht nur der öffentliche Sektor, sondern auch die anderen Akteure des touristischen Ökosystems müssen sich engagieren. Ideen und Innovationen sowie neue Partnerschaften sollten beschleunigt werden. Es muss eine bessere Koordinierung zwischen nationalen und regionalen Tourismuspolitiken und -maßnahmen gewährleistet werden.

Politische Orientierungshilfen

Ein geeigneter und ortsspezifischer Policy-Mix ist unerlässlich, um die Erholung des Tourismussektors zu unterstützen und sich gleichzeitig auf den Wandel hin zu Digitalisierung und nachhaltigem Tourismus vorzubereiten. Insgesamt stehen regionale Initiativen zur Förderung der lokalen Entwicklung und die Zusammenarbeit vieler verschiedener Partner innerhalb des touristischen Ökosystems eines Reiseziels im Mittelpunkt der meisten politischen Initiativen. Um den Tourismus widerstandsfähiger gegen externe Schocks zu machen und nachhaltige Tourismusmodelle zu etablieren, ist die Zusammenarbeit mit Akteuren aus der gesamten Wertschöpfungskette und oft auch von außerhalb des Systems, über die Grenze oder außerhalb des Reiseziels erforderlich.

Lokale und regionale Maßnahmen

Lokale und regionale Maßnahmen auf der Ebene der Destinationen müssen diese zu attraktiven Orten für Besucher und Einwohner machen und den Tourismus als wichtigen Bestandteil umfassenderer Raumentwicklungsstrategien verstehen. Regionale Behörden können die Digitalisierung ihrer Tourismussektoren vorantreiben und sicherstellen, dass die Entwicklung des Reiseziels alle Akteure des touristischen Ökosystems einbezieht. Neue Tourismusmodelle müssen sich auf die Entwicklung ortsbezogener Wertschöpfungsketten konzentrieren, damit ein größerer Teil des wirtschaftlichen Nutzens in der Region bleibt.

Im Einklang mit den politischen Zielen für den Zeitraum 2021-2027 können die Programme der EU-Kohäsionspolitik die Erholung des Tourismus auf vielfältige Weise fördern.

Politisches Ziel 1 - Ein intelligenteres Europa: Entwicklung intelligenter Reiseziele. Stärkung der Tourismusakteure als Förderer der Innovation. Intelligente Spezialisierungsstrategien können dazu beitragen, ein innovationsfreundliches Umfeld für Tourismusakteure zu schaffen und die gesamte Wertschöpfungskette einzubeziehen. Die digitale Transformation des Tourismus spielt in vielen Initiativen eine wichtige Rolle.

Politisches Ziel 2 - Ein grüneres, kohlenstoffarmes Europa: Die Zusammenarbeit mit dem gesamten touristischen Ökosystem und anderen Akteuren (Mobilität, Agrar- und Ernährungswirtschaft, Energieerzeugung, Reiseindustrie, Kreuzfahrtunternehmen usw.) in der Region ist der Schlüssel, um als Reiseziel und als Region klimafreundlicher zu werden. Unterstützung bei der Entwicklung und Umsetzung von Nachhaltigkeitsstrategien in den Reisezielen und für die verschiedenen Tourismusprodukte. Nachhaltigere Tourismusmodelle können nur erreicht werden, wenn alle relevanten Akteure zusammenarbeiten.

Politisches Ziel 3 - Ein besser vernetztes Europa: Nachhaltiger Tourismus ist auf nachhaltige Verkehrsoptionen angewiesen. Dazu gehören alternative Reisemöglichkeiten (Bahn, Bus), die weniger CO2-intensiv sind, sowie eine Fahrradtourismus-Infrastruktur. Darüber hinaus kann die Verringerung der negativen Umweltauswirkungen von Kreuzfahrtschiffen und Flugreisen einen nachhaltigen Tourismus unterstützen.

Politisches Ziel 4 - Ein sozialeres Europa: Der Tourismus ist ein Instrument zur Förderung der lokalen wirtschaftlichen und sozialen Entwicklung. Der Gesundheitstourismus ist ein aufstrebendes Modell. Bildung kann sich direkt auf die Qualität der Beschäftigung im Tourismus auswirken.

Politisches Ziel 5 - Ein bürgernahes Europa: Die Erleichterung von Bottom-up-Initiativen - die sich größeren Projekten anschließen können - und die Schaffung geeigneter Räume und Möglichkeiten für Basisinitiativen, um mit Innovatoren, Digitalexperten, Unternehmern und Geldgebern zusammenzukommen, sind von entscheidender Bedeutung, um sicherzustellen, dass Tourismusentwicklungen gut in den Regionen verankert sind.

Maßnahmen auf europäischer Ebene

Maßnahmen auf europäischer Ebene sind erforderlich, um den Aufschwung hin zu einem widerstandsfähigeren, nachhaltigeren und digitaleren Tourismus in Europa zu unterstützen, der in den Schlussfolgerungen des Rates vom 27.05.2021 gefordert und bereits teilweise in der Konsultation der Interessengruppen zum „Transition pathway for tourism“ (Sommer 2021) von der Kommission vorgeschlagen wurde.

Europäischer Tourismusbinnenmarkt. Der europäische Binnenmarkt deckt den Bedarf an gemeinsamen Standards und Anforderungen im Bereich des Tourismus nicht vollständig ab, um sicherzustellen, dass Touristen mit nur einem einzigen Papier über die COVID-19-Anforderungen und mit gemeinsamen Standards für nachhaltigen Tourismus problemlos durch die EU reisen können.

- Sicheres und nahtloses Reisen innerhalb der EU erfordert mehr Koordination und gemeinsame Standards in Bezug auf COVID-19-Zertifikate und die damit verbundenen Rechte.

- Der nachhaltige Tourismus in der EU erfordert gemeinsame Standards und Zertifizierungssysteme für das Gastgewerbe. Im besten Fall handelt es sich dabei nicht um ein neues Zertifikat, sondern um die Anpassung bestehender internationaler Standards und Zertifikate.

Europäische(r) runde(r) Tisch(e) für Tourismus. Der Tourismus ist eine horizontale Aktivität und hängt von der Zusammenarbeit einer Vielzahl von Akteuren ab. Um den Tourismus in der europäischen Politik zu stärken, könnte eine Reihe von Runden Tischen zum Thema Tourismus hilfreich sein.

- Ein europäischer dienststellenübergreifender Runder Tisch könnte als Plattform für eine bessere Koordinierung der EU-Politiken, -Initiativen und -Förderinstrumente dienen, die sich auf Tourismusziele und -industrien auswirken, und zwar in allen relevanten Generaldirektionen.

- Ein Runder Tisch mit EFRE-, KF-, ESF- und ELER-Programmen, die sich mit dem Tourismus befassen, z. B. im Rahmen von COESF und EGESIF, könnte die gegenseitigen Ansätze zur Unterstützung des Tourismus im Rahmen der Kohäsionspolitik stärken. Auch die Akteure der RRF sollten einbezogen werden.

- Ein europäischer öffentlich-privater Runder Tisch zum Thema Tourismus könnte relevante Schlüsselakteure im Bereich der öffentlichen Politikgestaltung und Vertreter verschiedener Segmente der Tourismusindustrie in Europa zusammenbringen und wichtige Maßnahmen wie die virtuelle Beobachtungsstelle für den Tourismus mit den Bedürfnissen von Regionen und Entscheidungsträgern verbinden.

Wissen über den europäischen Tourismus. Sowohl bei den europäischen Tourismusstatistiken auf regionaler Ebene als auch bei den Plattformen zur Überwachung der Tourismuspolitik gibt es Raum für weitere Maßnahmen.

- Eurostat erhebt einige vergleichbare Tourismusstatistiken auf regionaler Ebene. Um eine bessere Entscheidungsgrundlage zu schaffen, ist jedoch eine gemeinsame Datenerhebung einer breiteren Palette von gemeinsamen Indikatoren erforderlich.

- Nach dem Beispiel der EU Science Hub Knowledge Centres könnte eine europäische Plattform zur Überwachung der Fortschritte im Bereich des nachhaltigen Tourismus auf regionaler Ebene entwickelt werden, die Informationen über intelligente Tourismusstrategien sammelt.

Der Abschlussbericht schließt mit spezifischeren **Lehren für die verschiedenen Arten von Tourismusregionen**, wobei allgemein die Notwendigkeit hervorgehoben wird, die negativen Auswirkungen der Massifizierung und der Abhängigkeit von Akteuren der Reisebranche von außerhalb der Region durch Tourismusmodelle und -ansätze zu überwinden, die das Reiseziel stärken und das Engagement der Gemeinschaft fördern. Neue Maßnahmen sollten sicherstellen, dass die touristischen Aktivitäten mehr Wert und Respekt für die Bevölkerung und die Umwelt schaffen. Die Nachhaltigkeit muss für das Reiseziel als Ganzes sichergestellt werden, Lösungen sollten nicht einzelnen Initiativen oder Pilotprojekten überlassen werden.

Insgesamt müssen Maßnahmen auf allen Ebenen, von der lokalen bis zur europäischen, auf die Dekarbonisierung und die Verringerung der negativen Umweltauswirkungen des Tourismus hinarbeiten. Digitalisierung und Innovation werden unumgänglich sein, wenn es darum geht, Reiseziele und Branchen zu erholen und sie widerstandsfähiger und nachhaltiger zu machen. Darüber hinaus muss der Tourismus als wichtiger Teil der Raumplanung betrachtet werden und sollte in ständigem Kontakt mit sektoralen Politiken wie Verkehr, digitale Infrastruktur und Ausrüstung, Wasser- und Abfallwirtschaft, Energie, öffentliche Räume und Infrastruktur stehen. Auf der Ebene der Reiseziele, der Mitgliedstaaten und der EU sowie grenzübergreifend im Rahmen von Interreg ist eine gute Governance und die Zusammenarbeit einer Vielzahl von Akteuren erforderlich.

Introduction

This is the Final Report for the study on regional impacts of the COVID-19 crisis on the tourism sector (CCI 2020CE16BAT074), running from November 2020 to August 2021. This means the COVID-19 pandemic was in full swing during the study and the end of the pandemic as well as the full health and socioeconomic impacts effects are not fully known. Still, the analysis has enabled some solid conclusions on what is to be expected and how to address the needs of tourism destinations to boost recovery including making them more resilient, sustainable and digitalised.

The study assesses how different tourist regions are affected by COVID-19 and potential future developments. It combines analysis of territorial diversity and the economic importance of tourism (and its prospects) with the territorially diverse impacts of the pandemic as well as policy responses and recovery measures. There is also a time dimension, as impacts differ between what we have seen so far (holiday seasons with travel restrictions) and what can be expected in the short- and medium-term. The findings on impacts of the pandemic and lessons learned from policy responses have enabled policy recommendations to help tourism regions adapt for the future.

The study is based on analysis of literature and European data, a survey of tourism players, case studies across Europe and a forecathon. Chapter 1 provides a quick introduction to tourism-ecosystems, as the central point defining tourism regions, and analysis of regional impacts of the pandemic on the tourism sector. Following that, chapter 2 provides insights on the regional diversity of tourism destinations in Europe addressing various forms of tourism and variations in the economic importance of tourism on jobs and businesses in a region. Chapter 3 provides an overview of the territorial diversity of exposure to COVID-19 lockdowns affecting tourism, as well as sensitivities for regional tourism economies. While most potential impacts on tourism are devastating, some regions could potentially benefit from the pandemic. The chapter closes with regional impacts as well as expectations for the near future. Chapter 4 looks into a more distant future and highlights trends that need to be taken into consideration when discussing future policy measures. A particular emphasis is on trends which have been accelerated by the pandemic. Chapter 5 presents an analysis of policy responses and measures to support tourism players. This work includes conclusions from the case studies, which are presented in the annex. Finally, chapter 6 provides lessons learned from this study and policy pointers supporting a future-oriented recovery of tourism regions.

The report has been drafted by Kai Böhme, Silke Haarich and Maria Toptsidou with support by Flavio Besana, Clément Corbineau, Sebastian Hans, Frank Holstein and Christian Lüer (Spatial Foresight), Dea Hrelja and Alessandro Valenza (t33), Tayrne Alexandra Butler and Dolores Ordóñez (AnySolution), Cristina Nuñez and Thomas Guillot (NECSTour), with language editing by Tim Wills.

1 The tourism ecosystem in Europe

Tourism is vital to the economy in many European regions and is one of the sectors mostly heavily affected by COVID-19 in the short-term as well as the medium to long-term.

In 2019, the EU-28 tourism industry employed 22.6 million people (11.2% of EU employment) and accounted for 9.5% of EU GDP. In the same year, travel and tourism grew by 2.3%, while overall GDP growth was only 1.4% (WTTC & Oxford Economics, 2020). Tourism in the EU involves some 3 million enterprises, the vast majority of which are SMEs. Tourism is the fourth largest EU export category and brings spill-over benefits to the European economy as a whole: EUR 1 of value added generated by tourism results in an additional EUR 0.56 of value added from other industries. (European Commission, 2020, p.7). Spain, France, Italy and Germany benefit most from tourist flows. In general, domestic tourism in 2019 accounted for 65% of tourism expenditure on average in the EU, and 'inbound expenditure' by visitors from other countries for 35%. (Eurostat, 2019)

To understand and analyse how regional economies are affected by COVID-19's impact on tourism, it is important to understand the complexity of the tourism industry in Europe. It is a cross-cutting economic activity. Unlike manufacturing or service products, tourism is heterogeneous. It is complex and has plenty of complementary components provided by private suppliers and the public sector. (Kachniewska, 2013; Yalçınkaya & Güzel, 2019)

To analyse tourism as an economic sector requires a classification of products mainly for tourism expenditure and productive activities that define tourism industries. The industry is a grouping of establishments that have a characteristic tourism activity. (OECD, 2020a, p. 11)

According to the World Tourism Organisation, tourism associated economic activities refer to (UNWTO, 2010, p. 42):

- Accommodation for visitors
- Food and beverage serving activities
- Local/International passenger transport: Railway, Road, Water and Air passenger transport, as well as Transport rental
- Travel agencies, reservation services, tourist operators
- Cultural activities
- Sports and recreation
- Retail trade of country-specific tourism goods.

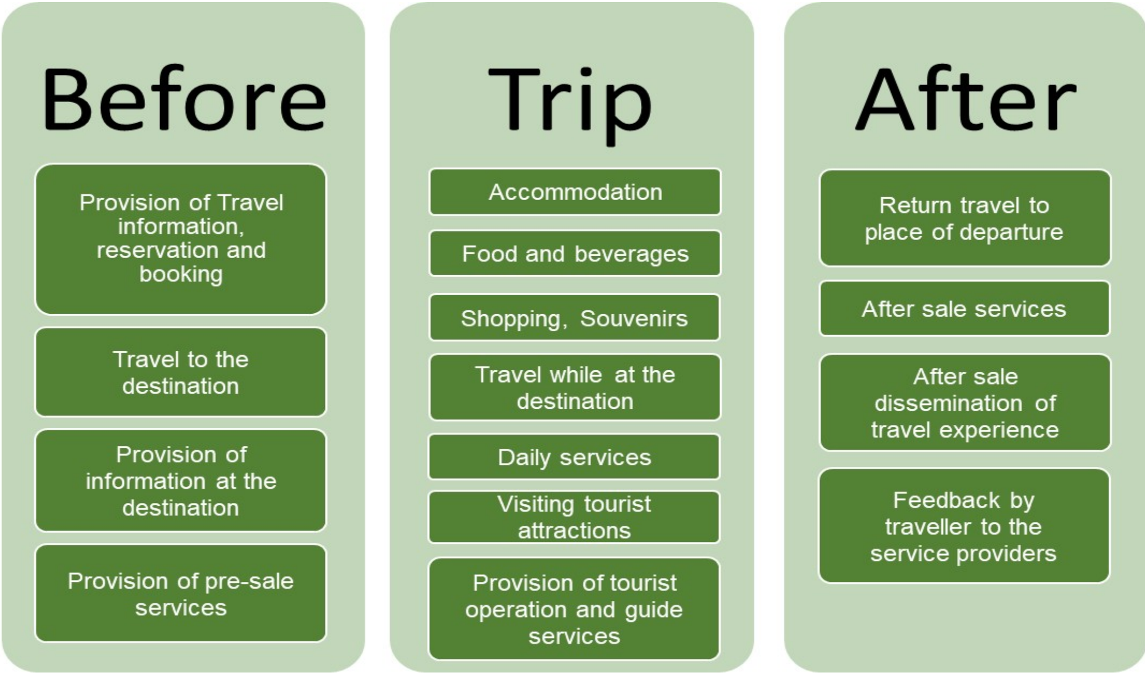
A specific feature of tourism is its intrinsic link to the territory and to the local 'container' of the experience, also called the 'destination'. This link to the territory, a dependence on natural conditions (e.g. weather, season) and the changing combination of services makes each travel and tourism experience more or less unique, even if services such as accommodation, transport and food are similar and even standardised. More than other products or services, tourism follows the 'environmental paradox' so the experience depends on exploiting local resources, which – at the same time – must be preserved (Romao et al., 2017, p. 3).

The tourism industry can be analysed by looking at the demand side, from the perspective of the tourist, or the supply side, so the companies and individuals that offer services or products to tourists.

On the demand side, tourism and related travel flows can be classified by the main purpose (leisure, business, medical, etc.), by product, duration, origin or destination, modes of transport or type of accommodation. The demand side can also be organised by demands before, during and after the trip (see Figure 1.1).

At the same time, different types of destination, such as city, seaside, countryside (including lakes, rivers, etc.), mountains (highlands, hills, etc.), or cruise ship, give an idea of the predominant product demanded by tourists.

Figure 1.1 Tourism from the demand perspective: customer flow



Source: own elaboration based on Hjalager et al. (2016)

A 'tourism product' is a combination of aspects such as the characteristics of places, modes of transport, types of accommodation and activities around a specific centre of interest. The notion of 'tourism product' is used by professionals to market specific packages or destinations. It is then possible to speak of specific types of 'tourism products', such as sun-and-beach, winter, MICE[1], culinary, eco-, city, agro-, health/wellness tourism, etc. At a destination, different 'tourism products' can overlap, in particular when tourism professionals and destination managers try to position new products on the market (see also UNWTO, 2010, p. 26).

Technological progress in information and communication technologies (ICT) have radically changed the way tourism products are created, offered and purchased over the last three decades.

On the supply side, a combination of economic sectors contributes to tourism products and services. Some sectors contribute directly, namely lodging and hospitality, while others contribute indirectly or through the supply chain with multiplier effects on income and employment.

Analysis of the tourism industry often looks at the number and characteristics of enterprises/establishments or the number of employees in the supply chain.

The most relevant economic sectors are accommodation, transport and provision of food and beverages in restaurants, bars and cafes. However, experts underline that more than a third of tourism value added for a domestic economy comes from indirect impacts. This reflects the breadth and depth of links between tourism and other sectors such as retail, construction, entertainment and professional services (OECD, 2020a, p. 22).

[1] MICE describes activities related to business meetings, incentives, conventions and exhibitions/events.

The specificities of the tourism value chain as well as the strong interaction between companies in different industries and destination management mean that a systemic perspective is required when analysing the sector more in detail. Three aspects make it necessary to understand tourism as a larger interactive system that goes beyond the private companies providing tourism products and services.

Firstly, governance is important for organising and managing a tourist destination as well as for promotion and marketing. Traditionally this was the role of public sector organisations (e.g. tourism board, tourism authority). Professional destination management organisations (DMOs) are increasingly semi-public bodies or public-private partnerships.

Secondly, relationships between the different industries and companies that contribute to the tourism experience are ever more complex. Many destinations therefore have an integrated cluster approach and consider external factors that increase competitiveness of the sector. Public and private cooperation is also at the centre of this approach. This has led to cluster organisations that support and invest in strategic support activities such as training, innovation and research. Some of these clusters focus not on the destination or the sector as a whole but on specific products such as health tourism – e.g. the Lithuanian Medical Tourism Cluster 'LitCare' – or competitive factors such as tourism technology – e.g. the 'Turistec' Cluster in Spain.

Thirdly, over the years the effects of tourism on other economic sectors and the environment have become more evident and better understood. On the one hand, multiplier effects on sectors such as construction and flexible employment are welcomed and encouraged by regional and national governments. On the other hand, debates on impacts on the environment and on local communities make the negative effects of tourism ever more visible. Increasing noise and congestion from tourism, pressure on scarce resources like water, real estate and accommodation in city centres ('overtourism') leads to calls for external control of visitor numbers and a better balance of tourism benefits and costs.

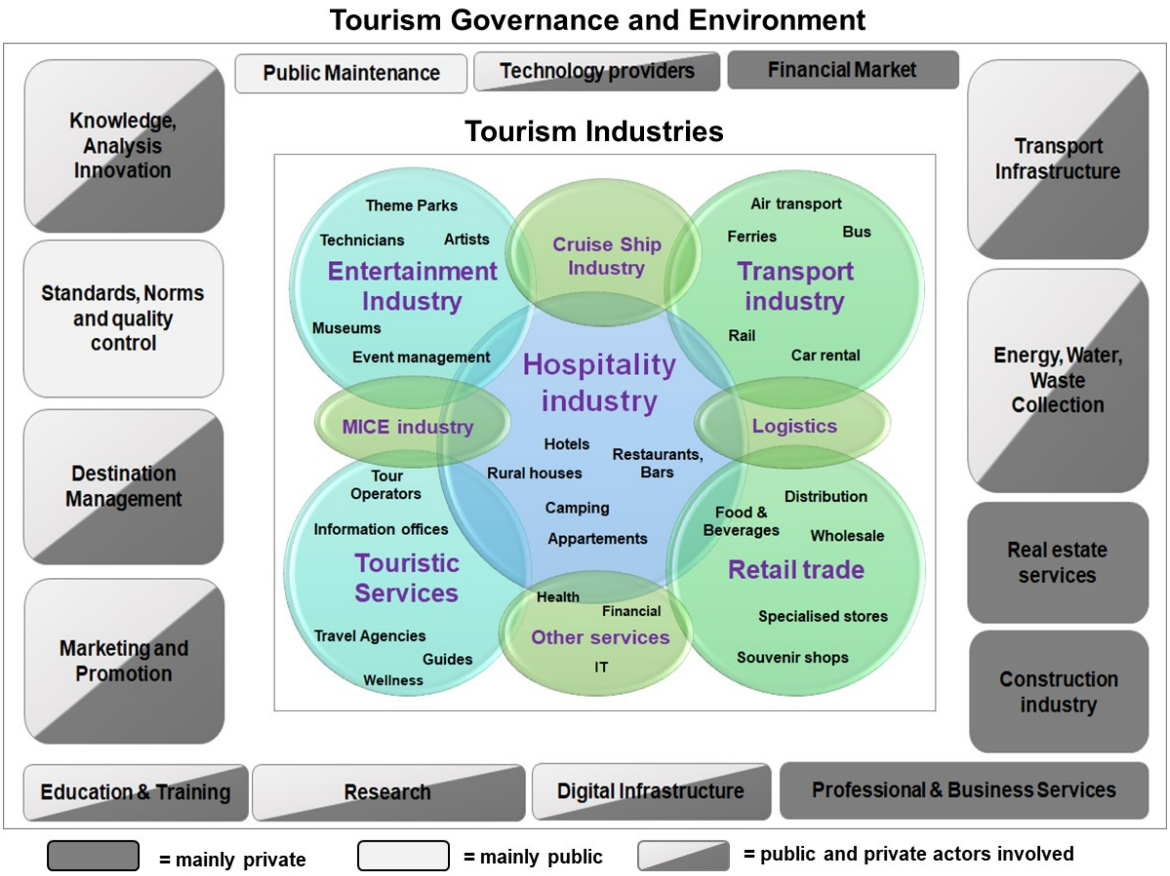
The OECD sees the need for an integrated approach to tourism policy, with input and support from industry and civil society. This is 'to both respond to the opportunities and address the multi-faceted challenges faced by the tourism sector. These include i) the complexity of tourism policy development due to its cross-cutting, multi-level, and fragmented nature; ii) the necessary infrastructure and skills needed to meet expected future demand, iii) the need to protect, manage and enhance natural and cultural resources, and iv) the transformation of tourism services linked with emerging technologies and digitalisation of the economy.' (OECD, 2020a, p. 98)

All this feeds into the integrated ecosystem perspective of the tourism sector that we have developed for this study (see Figure 1.2).

Within the tourism ecosystem, the effective governance of stakeholders requires adequate institutional and organisational arrangements. The role of DMOs is central to coordinating and integrating the development and implementation of policies and strategies across sectors and levels of government (Spyriadis et al., 2011). In addition, important framework conditions and supporting services (e.g. transport infrastructure and local transport services, public infrastructure including water supply and sewage disposal, technological and digital infrastructure, education and training, professional and business services) are necessary to facilitate the provision of tourism services to tourists and to ensure a positive travel experience.

Tourism ecosystems allow highlight challenges for regional development based on tourism, as the value chains and ecosystems often stretch beyond the local region. Indeed, substantial shares of the income generated through tourism often do not stay in the region. For regions dependent on tourism it will be important to capture larger parts of the value chain including more productive and knowledge intensive parts. The low value parts often have low productivity and salaries and need to temporarily import seasonal labour.

Figure 1.2 Tourism ecosystem



Note: MICE describes activities related to business meetings, incentives, conventions and exhibitions/events.

Source: Own elaboration

2 Regional tourism types

What is a tourism region, or what kind of tourism can be found in a region? Given the complexity of tourism ecosystems it is hard to give a simple answer. Yet, to understand how COVID-19 and future tourism trends could affect regional development and to develop place-based policy responses, we need to review what tourism means for different types of regions. This requires describing regional tourism types.

At present there is no comprehensive European regional tourism typology. However, bringing together different regional classifications can help define types that cover all EU tourism regions at NUTS2 level.

This study has brought together characteristics of the main forms of tourism in a region (see section 2.2), the origin of tourists (see section 2.3), regional dependency on tourism – preferably also considering regional dependency outside tourist destinations – (see section 2.4), and resilience to change in the sector (see section 2.5). As far as possible this work is based on European-wide topologies of tourism regions developed by the Joint Research Centre (JRC) (e.g. Batista e Silva et al., 2020). These types will be relevant later for understanding how COVID-19 and future trends affect regions differently, as well as for developing post COVID-19 policy recommendations for tourism that reflect Europe's territorial diversity.

At the same time the facets of tourism regions do not exist independently. A proposal for tourism type combining the most important facets is presented in section 2.6.

2.1 From tourists to tourist regions

Tourism is an economic activity where demand and supply meet in a complex ecosystem. There is not just one type of 'tourism demand', or 'tourism supply', so a typology of tourism regions needs to take into account which types of demand and supply meet in what types of regions.

2.1.1 Types of demand

Different forms of tourism demand and related travel flows can be characterised by their main purpose (leisure, business, medical, etc.), tourism products, duration, origins of visitors, modes of transport or types of accommodation.

The forms of demand can relate to types of tourists with different demographic, economic and territorial features. Coccossis & Constantoglou differentiate between three major groups, individuals/pioneers, small groups and mass tourists. These all affect the destinations differently (Coccossis & Constantoglou, 2006, pp. 9–12):

- Tourists who travel alone to pioneer destinations search for exotic and strange environments not yet discovered by the tourism industry. They use local facilities and want contact with the residents. Impacts on the socio-economic system and the environment are limited mainly because of small numbers, although in some cases it is strong as the destinations have no experience with tourism.
- Tourists who travel in small groups to destinations with facilities and growing reputation usually seek a combination of amenities and authenticity. Impacts on the socio-economic system and the environment as well as their contact with residents is average.
- Mass tourists prefer fully organised trips to famous destinations. They often have middle-class income and seek little interaction with local people beyond commercial links. The impacts on society and the environment are substantial.

2.1.2 Types of tourism supply – towards destinations

A 'tourism product' is a combination of local characteristics, modes of transport, types of accommodation, activities at the destination, etc. The notion of 'tourism product' is used by professionals to market specific packages or destinations such as sun-and-beach, winter, MICE, culinary, eco, city, agro and health/wellness tourism.

A single destination can offer overlapping 'tourism products', particularly when professionals and destination managers try to position new products on the market (see also UNWTO, 2010, p. 26).

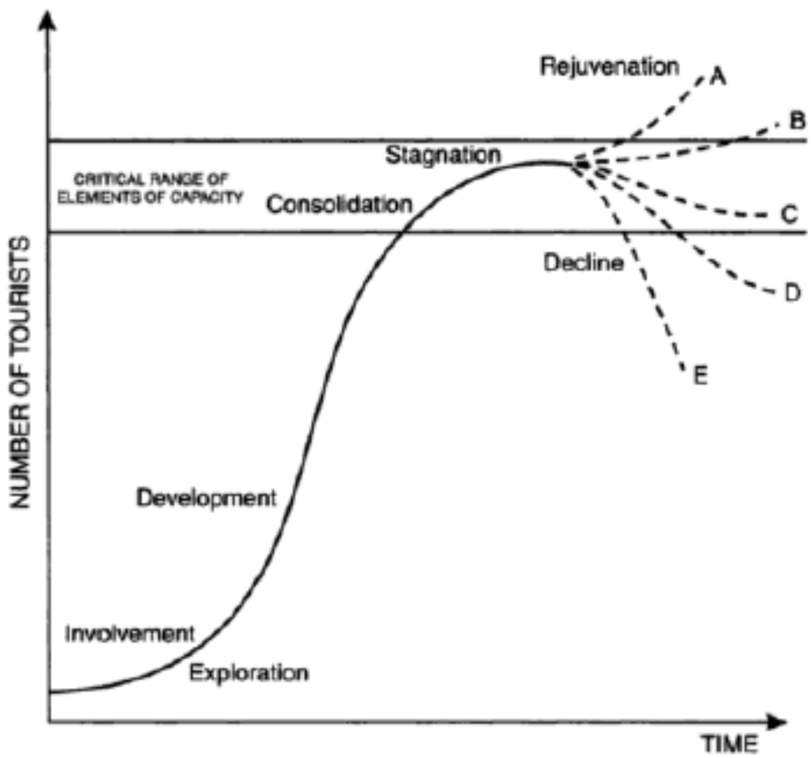
Different types of destinations, such as city, seaside, countryside (including lakes, rivers, etc.), mountains (highlands, hills, etc.) and cruise ships, give an idea of the predominant product on offer. Furthermore, destinations have different population size, infrastructure, labour, places of reception, means of transport and growth characteristics (including number and density of beds, or ratio of beds to the population). Mainly based on these characteristics, Coccossis & Constantoglou (2006, p. 15) differentiate three types of supply; extensive development, local development with extensive trends and slow localised development.

2.1.3 Lifecycle of destinations

Tourism demand and supply are both dynamic. This dynamism is also reflected in the lifecycle of destinations. This lifecycle describes a typical evolution of tourist sites from exploration to involvement, development, consolidation, stagnation and decline or rejuvenation (cf. Butler, 1980; Mouhadou Bamba, 2018).

The resilience and competitiveness of a destination depends, therefore, also on the stage of development with the number of tourists, maturity of tourism infrastructure and governance. This is particularly relevant when elaborating policy advice and preparing decision-making for future policy initiatives.

Figure 2.1 Lifecycle model of tourism destinations



Source: Butler (1980)

The lifecycle of destinations is shown in Figure 2.1. To start with, visitors come in small numbers, restricted by lack of access, facilities and local knowledge. As facilities develop and awareness grows, visitor numbers increase. With marketing, information dissemination and more facilities, the area's popularity grows. Eventually, the increase in visitor numbers slows as carrying capacity is reached. If the attractiveness of the area declines relative to other areas because of overuse and the impacts of visitors, the number of visitors may also decline if the destination does not manage to re-invent itself and stay attractive. In some cases, the lifecycle of a destination mirrors the aging process of its main target group. Detailed phases of the lifecycle are (cf. Butler, 1980; Mouhadou Bamba, 2018):

- **Exploration:** Few people visit the area. These are mainly adventurous tourists, interested in nature/culture and close interaction with local people. This tourism is based on word-of-mouth promotion and has minimal effects on social, cultural and physical environments.
- **Involvement:** Tourist numbers increase but are still under local control. There is some advertising and an emerging tourist market and season. Interaction with local people stays high. However, tourism starts impacting social life and adds pressure on infrastructure, local entrepreneurs offer basic specialised services and facilities for tourists.
- **Development:** Tourist numbers increase rapidly to equal or exceed the local population. There are more foreign-owned facilities, less local control, intensive and extensive advertising, and the promotion of ´artificial attractions´. Impacts can be seen in terms of enhanced accessibility, migrant labour and a rapid landscape change.
- **Consolidation:** Growth rates start to decline. Tourism is a major economic sector in the region. There is heavy advertising and some opposition to tourism due to over-crowding and high-density tourism. There are also signs of product deterioration and abandoned facilities.
- **Stagnation:** The consolidation phase is followed by stagnation. Tourist capacity has reached or exceeded its limits, and the destination relies on repeats, package tourists and conventions. This phase has surplus hotel capacity and changes in ownership. Social, environmental and economic problems become visible.
- **Decline:** Following stagnation, there is a risk of declining tourist numbers and related economic activities. Often the focus shifts to weekend or same-day visitors with many facilities and products no longer available.
- **Rejuvenation:** Following stagnation a destination can also reinvent itself targeting new markets. This usually requires a complete change of the attractions on which tourism is based, including adding man-made attractions or taking advantage of untapped natural resources. This usually requires combined government and private efforts, and the new market might target specific interests or activity groups rather than being allocentric.

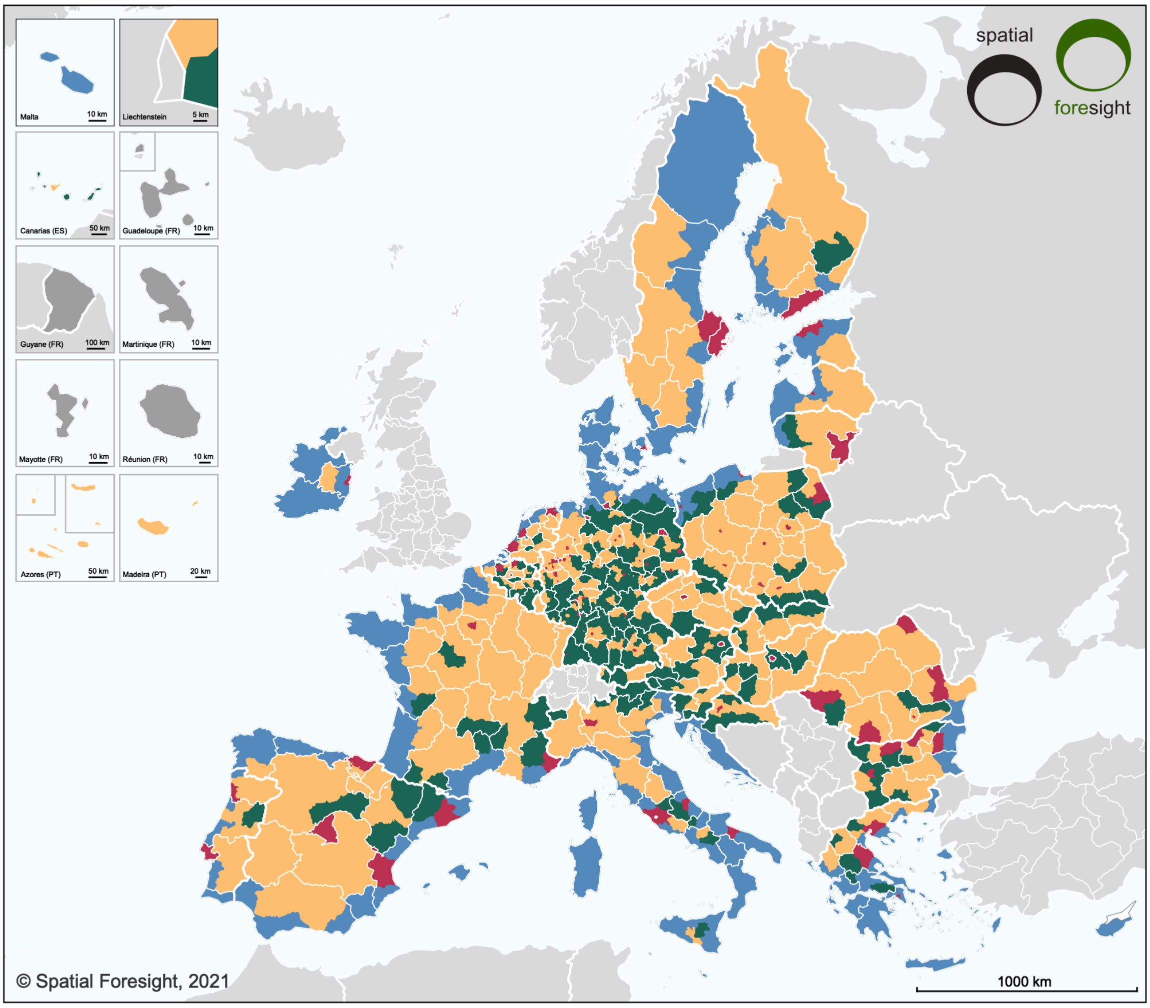
The impacts of COVID-19 and subsequent policy recommendations for tourism regions will differ depending on a destination's lifecycle stage.

2.2 Types of tourism and destinations

Various forms of tourism are often attributed to the area, the purpose (e.g. leisure, business or health) and the type of activity or product. Predominant examples are sun & beach, winter/mountain/skiing, rural/active/natural, urban/cultural/shopping, business /MICE and other niche products like health/wellness or wine/gastrotourism. To distinguish these types, some categories in relation to landscape/geography are presented below. These offer initial considerations for identifying indicators to map the diversity of tourism across Europe's regions.

Most forms of tourism are not well defined and are subject to interpretation. However, some broad types matching different types of region can be identified. Batista e Silva et al. (2020) developed a useful typology of tourist regions differentiating five types (see Map 2.1).

Map 2.1 Types of tourism destinations



Administrative boundaries: Eurostat GISCO, NUTS 3 (2016)

Dominant tourism destinations, 2019

Typology of tourism destinations based on hotel location patterns and geographical criteria

- Cities
- Coastal
- Mountains and Nature
- Rural and urban mix
- no data

Source: data communicated by JRC and produced in the framework of the publication from Silva, F. B., Barranco, R., Proietti, P., Pigaiani, C., & Lavalle, C. (2020). A new European regional tourism typology based on hotel location patterns and geographical criteria. Annals of Tourism Research, 103077.

Dominant tourism destination is based on a hierarchical clustering that reflects the geographical context of the accommodation capacity (number of rooms in tourism accomodations, based on information available from a combination of online booking platforms). Input data are based on a one-hand on a distribution of accommodation estimated from major online booking platforms and on the other hand on a spatial delineation of areas according to four basic types of geographical areas: coastal zones, mountain and natural areas, cities and rural areas.

This results in a typology with four categories described by the JRC:

Cities: regions with tourism capacity located predominantly in cities;

Coastal: regions with tourism capacity located predominantly in coastal zones;

Mountains and Nature: regions with tourism capacity located predominantly in mountainous or protected areas;

Rural and urban mix: regions with tourism capacity located predominantly in rural areas and/or regions with tourism capacity located in cities in combination with rural and/or mountainous and protected areas.

Source: own elaboration based on Batista e Silva et al. (2020)

City tourism

Urban regions with predominantly city tourism, account for 19% of tourism nights in the EU-27, with 5.3 nights per inhabitant. There is less seasonality for city tourism than for other destinations, with slightly higher lows in winter and lower highs in summer. (Batista e Silva et al., 2020)

Urban/city destinations offer a broad and heterogeneous range of cultural, architectural, technical, social and natural experiences as well as products for leisure and business. The attraction of urban areas for tourists is:

- the breadth and diversity of attractions such as professional sports, museums, high, low and middlebrow theatre, musical performances, and an exceptionally wide range of dining and shopping opportunities,

- the urban vibe and identity, i.e. the resonance that attaches to the built environment, local culture and culture heritage (e.g. linked to UNESCO cultural heritage sites as well as other industrial heritage sites).

Urban tourism can be a driving force in the development of cities and countries. However, there is a risk of ’Disneyfication’, i.e. reducing the authentic urban fabric to a ‘theatre setting’. To some degree tourist areas in Athens, Paris, Venice, Rome and Stockholm are at risk of ’Disneyfication’.

Other tourism activities which often – but not exclusively – focus on urban areas involve business travel and meetings. Typically, these are important for many destinations with good infrastructure. The MICE industry has grown extensively and rapidly in recent decades and was often seen as a ‘fortune changer’ for regional tourism rejuvenation, up to early 2020. MICE tourism-ecosystems include corporate meeting planners, meetings and convention departments in hotels, conference centres or cruise ships, food and beverage managers, logistics firms, private tour operators and transfer companies, incentive houses, professional trade organisations, tourism boards, tourism trade associations and travel agencies.

Coastal and maritime tourism

Costal and maritime tourism focuses on regions with capacity predominantly in coastal zones, including islands. This accounts for 42% of nights-spent in the EU-27, 12.3 nights per inhabitant, by far the highest intensity of tourism types. On average some 45% of tourists in coastal areas are foreign, considerably higher than for other types of destination. Coastal regions are also the most seasonal, with a very marked peak in summer. (Batista e Silva et al., 2020). Classic examples are the Algarve in Portugal, Costa de Sol and Balearic Islands in Spain, Corfu and Crete in Greece, but also islands like Sylt in Germany.

Approx. 3.2 million people work in sun and bathing tourism, which generates about EUR 183 billion in gross value added (ECORYS et al., 2016, p. 8)[2]. A large part of this type of tourism is around the Mediterranean, the southern part of the Atlantic coast, the Black Sea coast, as well as the Canary Islands and the other outermost European territories. Usually, it comes with high volume mass tourism and relatively high seasonality (less in the outermost regions). It also benefits from longer summer seasons. There is more individual and domestic coastal and beach tourism in other European coastal and maritime regions, for example, near the Atlantic, the North Sea coast or around the Baltic Sea. This type of tourism is even more seasonal, though there are efforts to reduce seasonality by capitalising on trends towards shorter trips.

[2] An important sub-sector within this is nautical tourism, with 6 million boats and 4,500 marinas in Europe. Marinas generate a turnover of almost EUR 4 billion and employ some 40-70,000 people.

Mountain and nature tourism

Mountain and nature tourism focuses on regions with tourism capacity in mountainous or protected nature areas. This accounts for 16% of nights spent in the EU-27, 7.3 nights per inhabitant. Winter tourism is as important as summer tourism. On average, there are more domestic tourists. (Batista e Silva et al., 2020)

Mountain tourism takes place in a defined and limited geographical space with distinctive characteristics inherent to a specific landscape, topography, climate, biodiversity (flora and fauna) and local community. It encompasses a broad range of outdoor leisure and sports activities. In economic terms, mountain tourism remains mostly in the valleys and basins, where it can make significant contributions to the economy. In the Alps, in 10% of municipalities (which are home to 8% of the Alpine population) tourism is the main economic sector. 46% of all beds are in 5% of the municipalities, while 37% of Alpine municipalities have no tourist beds (Permanent Secretariat of the Alpine Convention, 2013, pp. 27–28).

Rural and urban-mix tourism

Rural tourism has a low share of nights spent in the EU and low levels of tourism intensity. However, there are often high shares of foreign tourists. Urban mix tourism focuses on regions with tourism capacity in cities in combination with rural and/or mountainous and protected areas. (Batista e Silva et al., 2020)

On average, rural and urban mix tourism regions have more domestic tourists, while in the summer most visitors come from other EU countries or even outside Europe.

Tourism in rural and urban mix areas focuses often on rural life, art, culture and heritage. This benefits the local community economically and socially including interactions between tourists and locals for a more enriching tourism experience. Rural tourism includes agritourism, as well as farm, rural, soft, slow, alternative and eco-tourism. Generally, rural tourism has a high potential to stimulate local economic growth and social change because of its fit with other economic activities, its contribution to GDP and job creation, as well as its capacity to spread tourism across a wider territory. Urban mix regions usually have a combination of rural areas with attractive medium and small-sized cities and villages where visitors can shop or visit cultural attractions such as museums, heritage sites or landmarks.

Other types of tourism

Other types of tourism are not directly linked to the geographical features of a region and are therefore not covered by a territorial analysis. Examples for this are luxury or specific tourism such as wine, eco-, medical, golf, or wellness tourism, which can be found in various territorial settings. Other types of tourism relate to the form of travel such as cruise tourism which has grown significantly in the last decade.

Luxury Tourism in Europe. This covers desirable and premium experiences in terms of luxurious accommodation, convenient transport facilities and an authentic travel experience. Service providers offer outstanding services to travellers. In 2011 the International Luxury Travel Market (ILTM) estimated that globally there are approximately 200,000 luxury rooms in 200 destinations with a total 18-20 million rooms or about 1% of the market. Luxury travellers take at least 3-4 trips per year. According to Allied Market Research (2020), spending per person per trip is normally $7,150 – $9,600. Usually, the stay is short while expenditure is extremely high, mostly on shopping, high-cuisine restaurants and tailored activities (e.g. private yachts, helicopter trips, etc.). European countries are among the most preferred luxury destinations, with travellers predominantly from America, Asia and the Middle East. The most popular European luxury travel destinations can be metropolitan areas such as Paris and Milan, but also countries, for example, Germany and Italy. Other local destinations are the Alps (Zermatt, Gstaad and Verbier in Switzerland, Courchevel in France), the Greek Islands, places on the French Riviera and, to a lesser extent, cities in the Netherlands and Spain. Strong purchasing power and a search for exclusivity with high comfort and security are major factors for these travellers. Luxury tourism in most European destinations has few tourists but adds significantly to revenues. While luxury tourism is getting more common and accessible to more people, ultra-luxury tourism is growing (Allied Market Research, 2020). To some extent, the COVID-19 pandemic might boost luxury tourism offering more health and safety services.

Cruise Tourism in Europe. Europe is the world's second biggest source of passengers – 7 million Europeans went on a cruise in 2017, almost 8% more than in 2015. Europe remains the world's second most popular cruise destination, second only to the Caribbean. 6.5 million passengers embarked on cruises from European ports in 2017, 6% more than in 2015. Cruise ships are an important driver of the European shipbuilding industry which continues to build some of the world's most innovative and largest ships. In 2018, before COVID-19, 66 cruise ships were on order from European shipyards for delivery by 2021. An economic analysis of the industry (Cruise Lines International Association, 2018) stated that cruise lines employed about 5,600 European nationals in their headquarters and administrative offices, while an estimated 63,500 Europeans were employed on cruise ships.

Germany, Italy, Spain and France accounted for 85% of passengers, with Germany alone covering 31%. Major European cruise destinations include the Mediterranean, the Baltic Sea, the Atlantic (North Sea and the southern part) (CBI, 2021; Cruise Lines International Association, 2018).

The most important European home ports and hubs for cruises are Barcelona and Venice in the Mediterranean and Southampton, Hamburg and Kiel in Northern Europe. For visits and passenger numbers, other ports are important including Civitavecchia, Marseille, Palma de Mallorca, Naples, Valletta and Dubrovnik in the Mediterranean, Tenerife, Lisbon and Cadiz on the Atlantic, as well as Stockholm, St. Petersburg, Rostock, Tallinn, Helsinki, Bergen and Copenhagen in Northern Europe. Specific niches such as river cruises on the Rhine or Danube, overseas, theme or expedition cruises are not included in this analysis. The cruise industry is aware of its large environmental impact and the development of new technologies and cleaner fuels is now a priority. Large investments are going into energy efficiency technology and cleaner fuels. New greener solutions include less polluting propellants such as Liquified Natural Gas, batteries, as well as exhaust gas cleaning systems, advanced wastewater treatment, clean energy shore power, advanced recycling, reduced use of plastics, efficient lighting and solar energy. However, the cruise ship industry is far from being sustainable and is blamed for its high environmental impact. Natural resource overuse, massive waste, overtourism, as well as its low economic contribution to local communities are critical issues that are not in line with sustainable and responsible tourism (Cruise Lines International Association, 2019; Sanz-Blas et al., 2019).

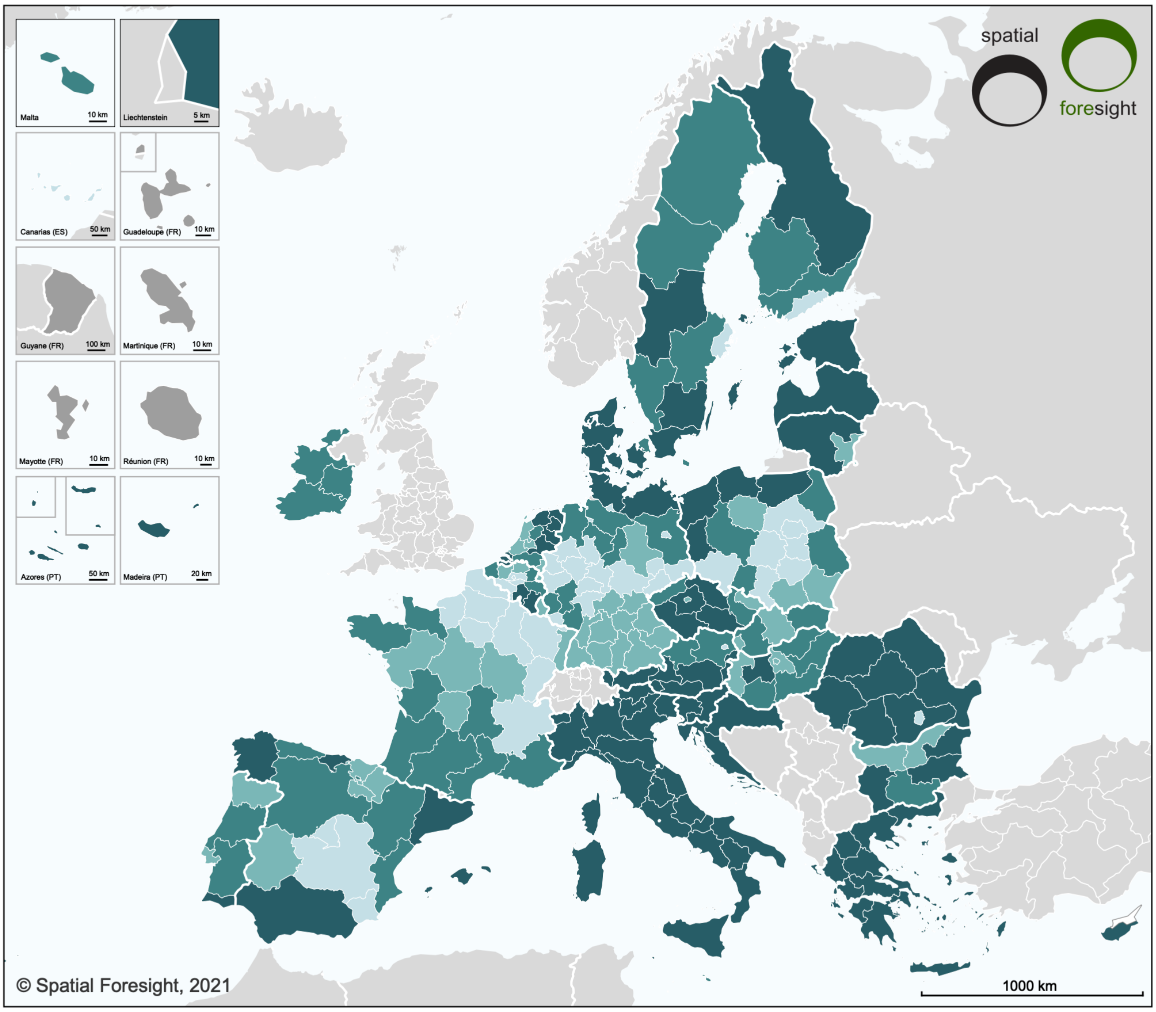
Global cruise tourism was expected to grow between 2018 and 2022 by 6%, but these projections are challenged by COVID-19. The pandemic has damaged the reputation of the industry and resulted in significant revenue loss (such as cancellation fees, reimbursement for tickets and costs for ships docking in port). Most cruise ships around the world were temporarily withdrawn from service. The financial impacts are significant and may lead to the closure of many cruise companies. The current situation will lead to increased attention on maintaining health and safety on cruise ships. Ships will now require robust screening and monitoring protocols, comprehensive sanitation practices with regular inspections, expanded onboard medical facilities and increased medical staff (KPMG, 2021).

2.2.1 Seasonality

While seasonality has been addressed by the types of destination, it is worthwhile taking a closer look into the spatial variations of tourism seasonality across European regions. The importance of tourism seasons (vs year-round tourism) as well as which seasons are most important, vary across regions.

The distribution of overnight tourists over the year shows that nearly all regions have a particular season. Some are large cities like Bucharest, Hamburg, Helsinki, Paris, Stockholm, Vienna and Warsaw. Other regions without a particular seasonality have little tourism including rural areas in Western France, Germany and Poland.

Map 2.2 Seasonality of tourism



Administrative boundaries: Eurostat GISCO, NUTS 2 (2016)

Seasonality of tourism activities in EU regions, 2016

Highest seasonality class registered at NUTS 3 level in the NUTS 2 region

low seasonality

high seasonality

no data

Source: data communicated by JRC and produced in the framework of the publication from Silva, F. B., Herrera, M. A. M., Rosina, K., Barranco, R. R., Freire, S., & Schiavina, M. (2018). Analysing spatiotemporal patterns of tourism in Europe at high-resolution with conventional and big data sources. Tourism Management, 68, 101-115.

Seasonality scores are compiled as follows: NUTS 3 are classified according to seasonality scores (1-4) that correspond to the distribution in quartiles of the coefficient of variation applied to monthly series of average daily number of overnight tourists. The indicator is then up-scaled at NUTS 2 by assigning the highest seasonality score recorded among all NUTS 3 regions in the NUTS 2 region.

Source: own elaboration based on Batista e Silva et al. (2018)

Areas with the highest concentration of tourism in one season are around the Mediterranean, the Baltic Sea, the Alps and regions in the Czechia, Romania and

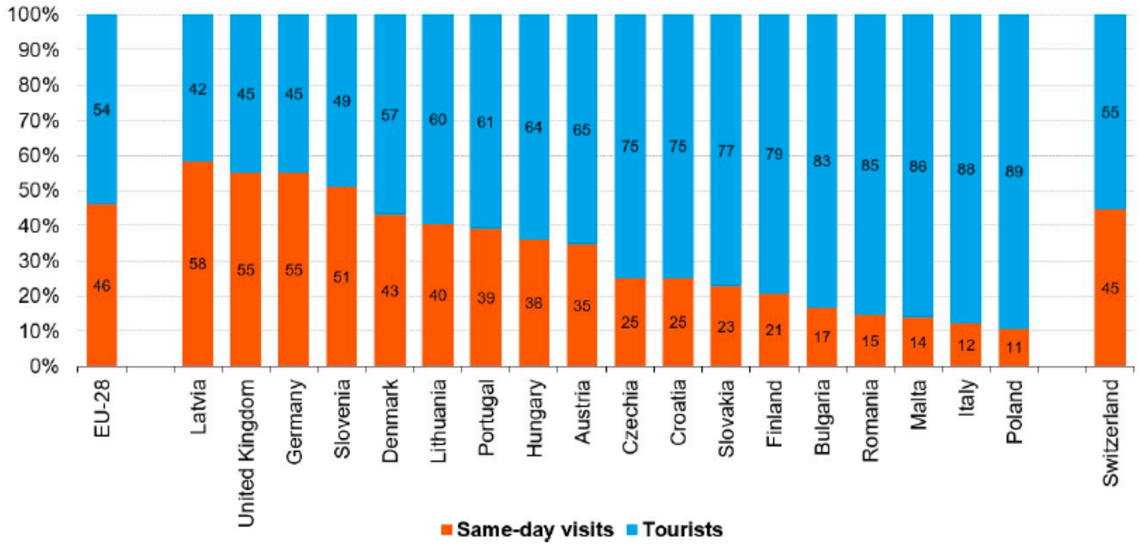
Bulgaria. Map 2.2 shows the seasonality of NUTS2 regions, based on the seasonality of their NUTS3 regions (cf. Batista e Silva et al., 2018).

Summer is the most popular season for most regions, which is explained by two important and correlated factors. First – summer months are when most people traditionally go on holiday, while activities such as education are closed or are running slower (e.g. manufacturing). Second – warm weather is very important for holidays in most regions, but there are some exceptions. The winter season is the most popular in some Alpine and Scandinavian regions for winter sports/activities. Autumn seems to be very popular in Ireland as well as in some inland regions of Romania, Bulgaria and Croatia. Finally, spring is the most popular season in some city-regions such as Rome, Brussels, Madrid, Bucharest, Milan and Linz, as well as in areas of Andalusia (Spain), Bulgaria, east Croatia and north of Paris. (Batista e Silva et al., 2018, p. 106; Cooper et al., 2004, p. 10)

2.2.2 Same-day visits

Same-day visitors are an important part of tourism which is not usually covered in statistics based on the number of overnight stays. Same-day visitors within a country can account for almost half a country's tourism expenditure. In Latvia, Germany and Slovenia same-day domestic trips generate more expenditure than domestic overnight stays (Eurostat, 2019).

Figure 2.2 Same-day visitor and tourist expenditure, share of domestic tourism expenditure (%)



Note: EU-28 aggregate estimated for this publication using available data.

Source: Eurostat, Data collection on TSA 2019.

Source: Eurostat (2019, p. 16)

Same-day cross-border visitors account for about 10% of inbound tourism expenditure. The highest shares are reported for Slovenia (50%), Poland (42%) Latvia (37%) and Czechia (27%) (Eurostat, 2019, p. 15).

Data on outbound same-day visits shows a similar picture to domestic travel. Looking at the number of private same-day trips rather than expenditure, Germans made about 415 million same-day domestic trips and 27 million same-day cross-border trips of more than 50 km in 2019 (DRV, 2020, p. 33).

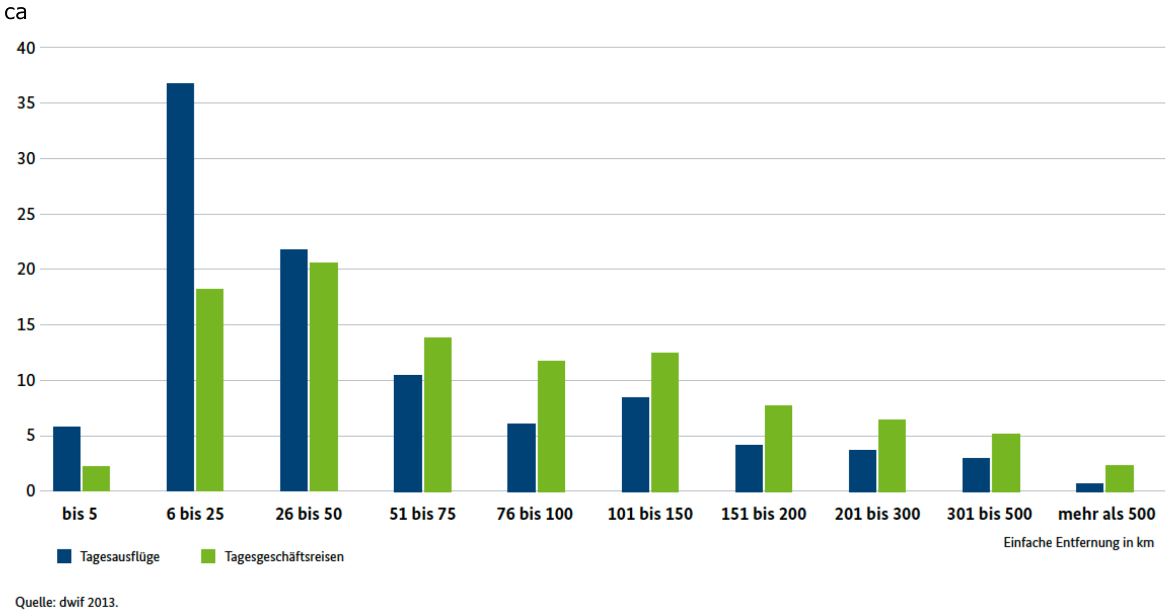
Considering that same-day visits are often limited to distances of 1 to 2 hours highlights the spatial pattern of such visits. In Germany, same-day trips average 73 km each way. However there is a clear difference between private same-day trips which averaged 66 km and same-day business trips which averaged 106 km each way in 2014 (see Figure 2.3) (dwif, 2014, p. 39). This implies that same-day tourism is not equally distributed across Europe, but there are considerable territorial variations depending on the attractiveness of a destination and its accessibility to major urban agglomerations. Proxies for areas with higher or lower potential for same-day visits could be the ESPON analysis on municipalities with at least 5% of their territory within 45 minutes travel to a functional urban area (see Map 2.3), or the DG REGIO map on the number of people that can be reached within a 90 minute drive (see Map 2.4). Both suggest that same-day tourism potential concentrates along the most densely populated areas in Europe, in particular the 'blue banana' from London to Milan.

Same-day visitors are not always welcomed, as they tend to spend less money than overnight visitors. Therefore, some major tourism destinations such as Barcelona are considering tourism taxes to fight overtourism.

Economic impacts of same-day visits in Germany

Same-day visitors are estimated to generate some 1.4 million jobs in Germany. This is based on direct and indirect income generated by these visitors (EUR 35 billion) and the average national income per capita (EUR 24,268). With some 2,845 million same-day trips and an average travel cost of EUR 17.40 per trip per person there is an additional EUR 49.6 billion in revenue from transport. This makes up almost 63% of spending by day travellers. (dwif, 2014, p. 89)

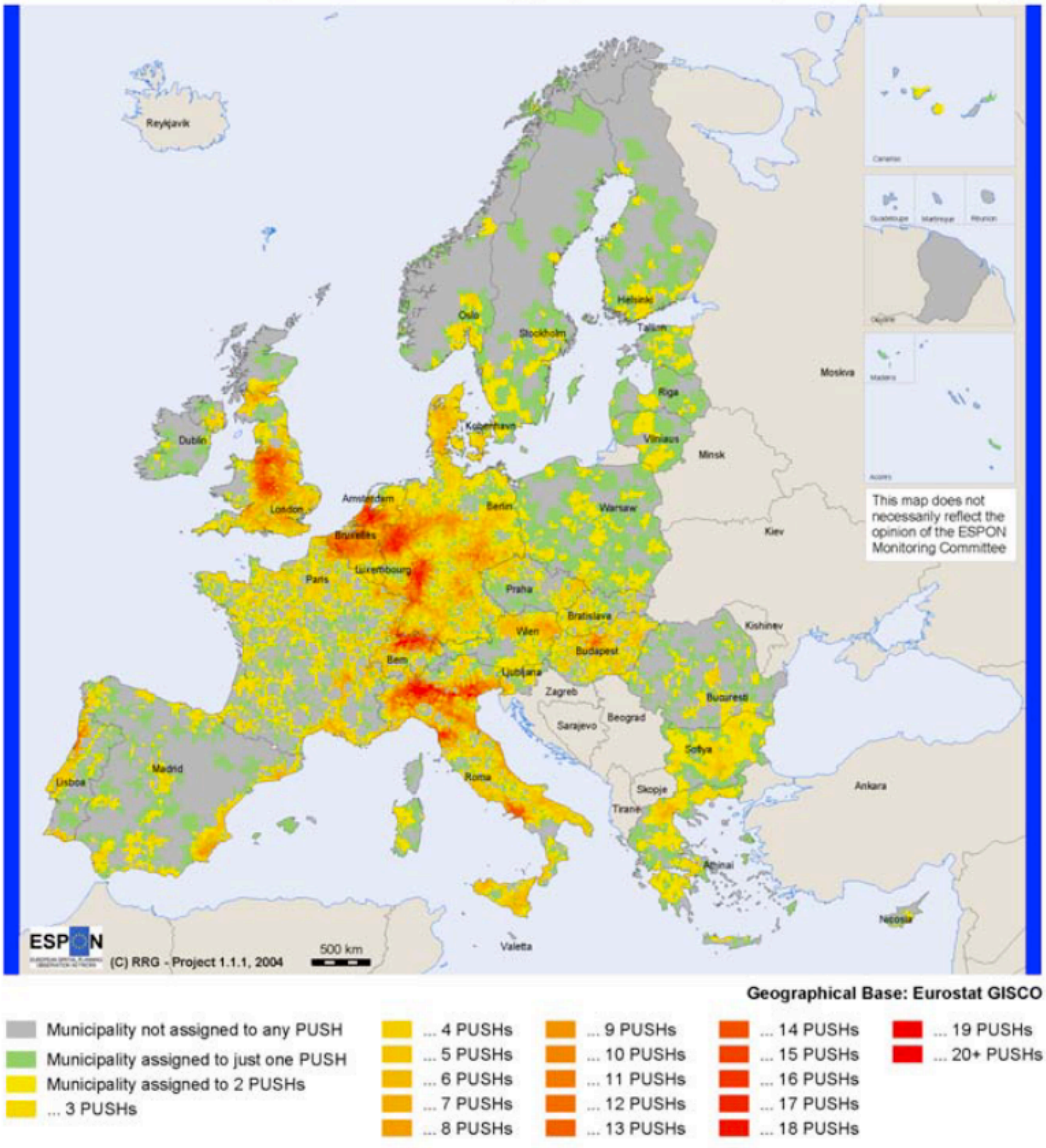
Figure 2.3 Distance of German same-day visits by purpose (%)



Information is in km, blue shows same-day tourist visits and green shows same-day business trips.

Source: dwif (2014, p. 39)

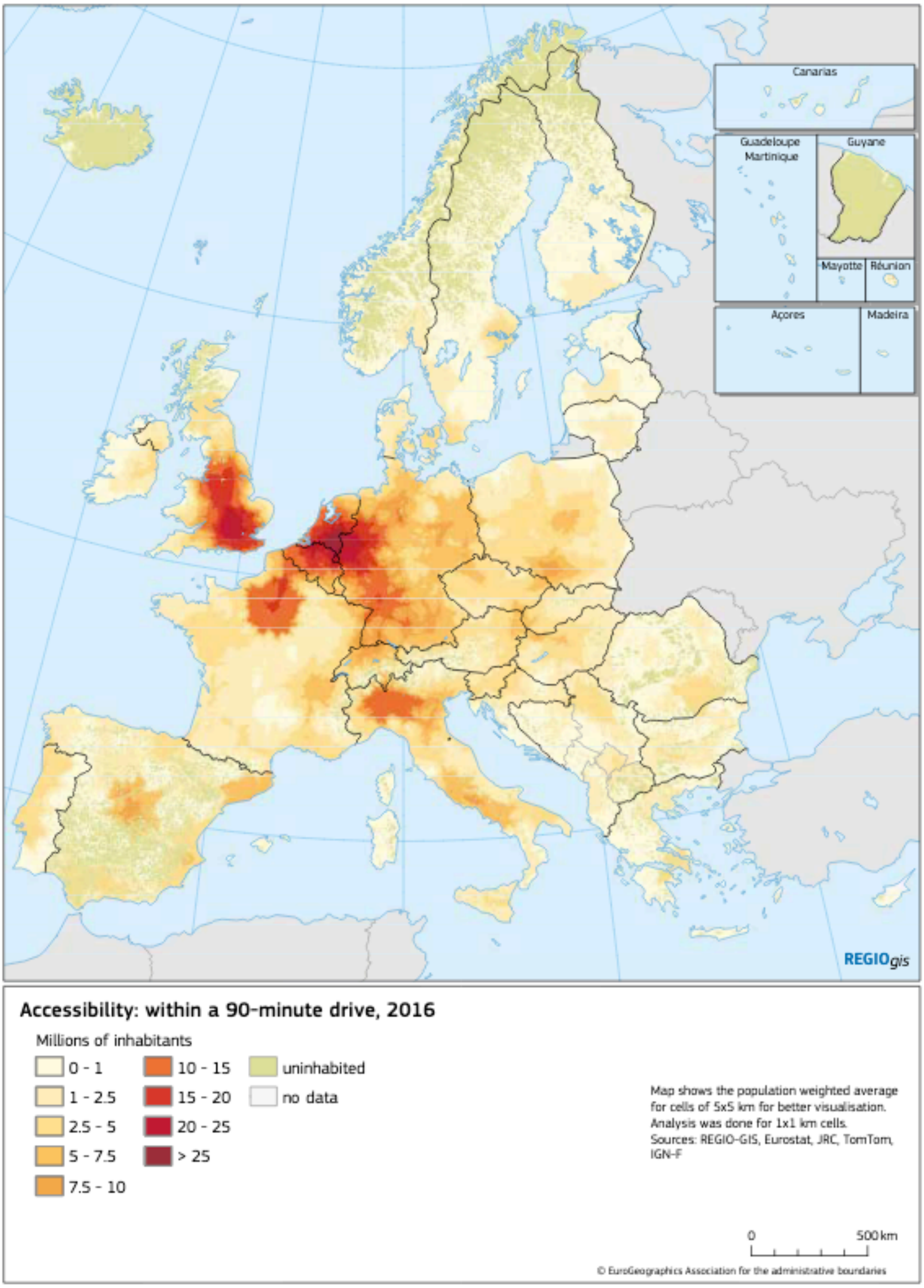
Map 2.3 Municipalities within 45 minutes of neighbouring functional urban areas[3]



Source: ESPON (2005, p. 37 Annex D)

[3] PUSH = Potential Urban Strategic Horizons, i.e. an area within 45 minutes of a functional urban area

Map 2.4 Accessibility: population within a 90-minute drive, 2016



Source: Dijkstra et al. (Dijkstra et al., 2018, p. 7)

2.2.3 Overtourism

While tourism often creates income-earning opportunities and can play a major role in favouring growth or demographic stabilisation for mountain communities, it may also lead to significant challenges for the destinations. Apart from the many positive effects of tourism, the local population and environment may also suffer from high tourism intensity, especially when the number of tourists is disproportionate to the local population. This is overtourism or exceeding an area's capacity.

Overtourism is normally in larger cities, islands and small places with limited capacity. Destinations such as Venice, Dubrovnik, Amsterdam, Bruges and Barcelona suffer from overtourism. Islands such as Crete and Corfu, as well as smaller places, for example in the Alps, show that overtourism is not just a phenomenon of urban tourism (Permanent Secretariat of the Alpine Convention, 2013, p. 83).

Examples of negative effects include (cf. e.g. Cooper et al., 2004; Permanent Secretariat of the Alpine Convention, 2013; UNWTO et al., 2018; Zelenka & Kacetl, 2014):

- Intense congestion and long work hours disrupting more traditional ways of life;
- Local culture, traditions, customs and handicraft facilities are turned into commodities conforming to tourist expectations and are partly de-familiarised or less accessible for 'locals';
- Significant seasonal variations in employment with possible seasonal unemployment;
- Changes in the population, so it is sometimes difficult to distinguish between 'locals', guest communities including immigrant workers and tourists;
- Out migration of residents with limited purchasing power, as the cost of living is too high;
- Increasingly high living expenses, including housing and land prices;
- Stress on local ecosystems, when tourism exceeds an area's ecological carrying capacity and natural limits to growth;
- Need to upgrade infrastructure and facilities (transport, water, sewage disposal, etc.) to cope with peak season demand, entailing additional costs and taxes.

Mapping or calculating overtourism is not straightforward, as it goes beyond the ratio of visitors and local people in the peak season. It has also to do with a place's 'psychological and social culture carrying capacity' and 'ecological carrying capacity' (see Zelenka & Kacetl, 2014). These limits are impossible to determine using European-wide datasets. Smart management of visitor flows also plays a role in reducing the feeling of crowdedness (see Sanz-Blas et al., 2019).

EASME recently contracted a study on 'Unbalanced tourism growth at destination level – root causes, impacts, existing solutions and good practices'. This study aims to contribute to a sustainable transformation of EU tourism based on objectives in the European Green Deal as well as the United Nations Sustainable Development Goals. In particular, the assignment will address overtourism by analysing its root causes and impacts. Diagnostic models using both quantitative and qualitative indicators will describe tourism pressure on specific destinations. Based on best practices to mitigate impacts, implementation models will be developed for destinations. These include mitigation and preventive activities to promote balanced and sustainable tourism. To account for the COVID-19 pandemic, changes in destination strategies will be considered, not only looking at past tourism hotspots but also at new, emerging overtourism destinations caused by domestic tourism and massive numbers of day trips. Furthermore, the assignment includes the development of indicators to measure overtourism at destination level. These outputs will be included in a compendium for stakeholders in these destinations to communicate and transfer the assignment findings.

2.3 Origin of tourists

The predominant origin of tourists in a region matters for the development of tourism offers as well as for the impacts that external shocks and travel restrictions may have on tourism regions. Regions receive tourists from their own country, other EU-28 countries and from outside the EU-28. In this data visitors from the UK are still considered as from another EU country.

Domestic tourists are the largest group, accounting for 53% of nights spent in 2019, and dominate in 2/3 of the regions. In 77, or 32% of NUTS2 regions, they make up at least 80% of nights spent. The highest figures are in German, Romanian and Polish regions, but also in inland Spain, France, Sweden and Finland. In many regions domestic tourists are almost the only type, e.g. in Mecklenburg-Vorpommern (Germany) and Sud-Vest Oltenia (Romania) domestic tourists account for 96% of nights spent. This is followed by Sud-Est (Romania) and Chemnitz (Germany) with 94%, Weser-Ems (Germany) and Kujawsko-pomorskie (Poland) with 93%. For another 80 regions (33%) domestic travellers make up 60-79% of the tourists. This is the case in most parts of France, Denmark and Hungary.

Tourists from other EU countries are the second largest group, accounting for 35% of nights spent in 2019. In 51 or 21% of NUTS2 regions, domestic and other EU tourists balance each other, with tourists from other EU countries accounting for 40-59% of nights spent. This is the case for major destinations such as Lisbon, Porto (Norte) and Algarve in Portugal, Madrid, Andalucía, Valencia, Cataluña and País Vasco in Spain, Paris in France, the Tyrrhenian Coast and Northwest Italy, and most parts of mainland Greece.

Only 13 or 5% of EU regions, can be clearly characterised as EU-tourist regions, with the highest share of nights spent by tourists from other EU countries and a small share by domestic or non-EU tourists. This is the case for Luxembourg, Malta, Croatia, but also city regions such as Vienna and Brussels and some secondary city-regions such as Thessaloniki and Salzburg, as well as prominent tourist areas such as the Balearic and Canary Islands, Madeira, Tirol and Vorarlberg in Austria.

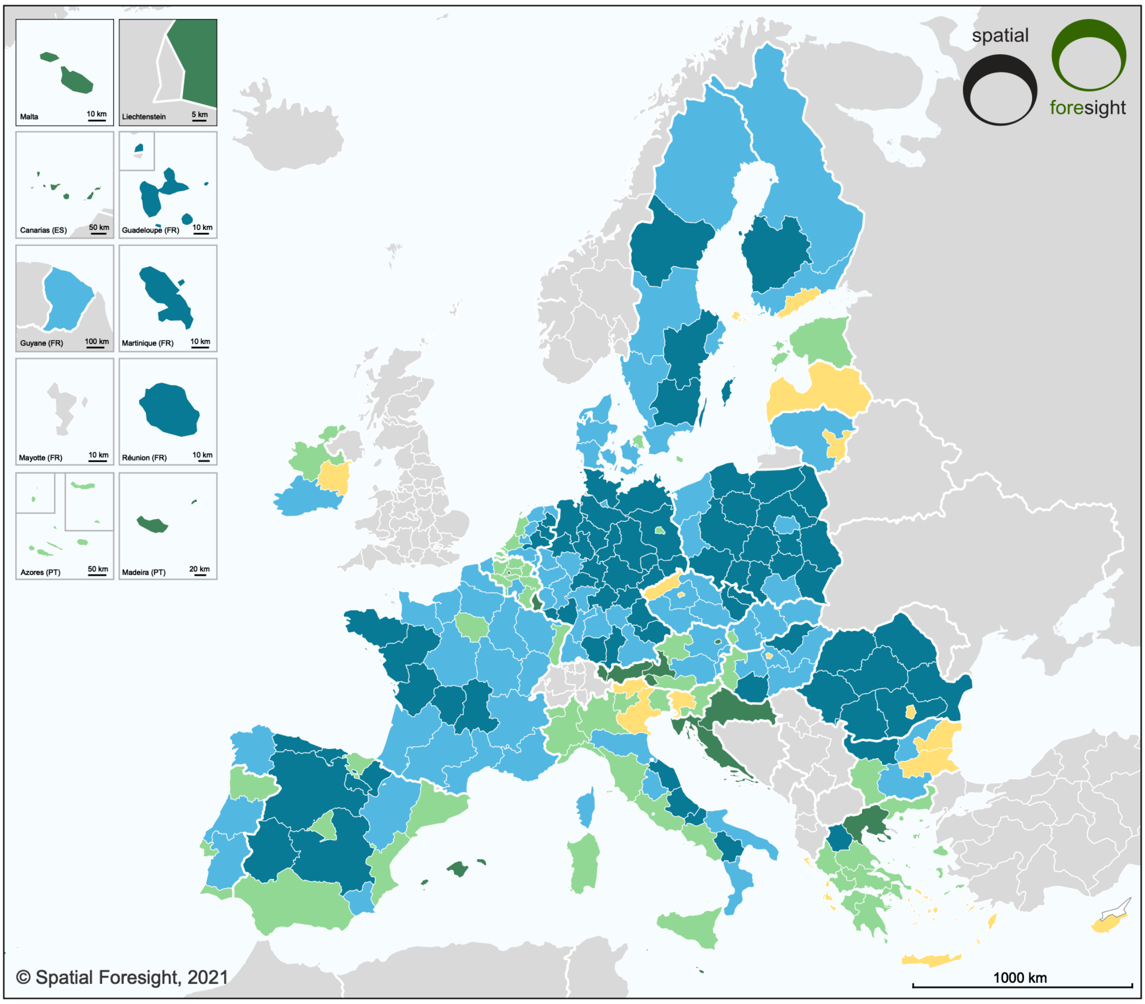
Tourists from outside the EU account for 12% of nights spent in 2019. In 18 or 8% of the regions, they account for 20-35% of tourist nights spent. The highest shares of non-EU tourists is in some of Europe’s global tourist destinations as well as in cities and regions with good links to Russia. Some examples are Prague (34%), Cyprus (34%), Vilnius (31%), Latvia (29%), Crete and the Ionian Islands (23% each) in Greece, Bucharest 23%, South Tyrol Bolzano/Bozen in Italy (22%), Karlovy Vary (Karlsbad) in Czechia (22%), Helsinki (22%) and Veneto (21%).

The regional pattern of tourist origins (see Map 2.5) provides insights into destinations and tourist offers – attracting particular types of visitors – but also into the vulnerability of a regional tourism economy to changes in international travel behaviour and travel restrictions. Certainly, such a picture deserves a nuanced reflection taking into account age groups and socio-economic profiles of the tourists. However, there is no comparable regional data for this.

Tourism preferences according to socio-economic profiles

A 2014 study analysed European preferences for tourism. The study showed that older respondents are more likely to go on holiday in their own country: 54% of people aged 55 and over, compared with only 38% of 15-24 year-olds. While 61% of people who left school aged 15 or under plan to holiday in their own country, only 48% of those who finished their education aged 20 or over intend to do so. Those with a higher level of education are more inclined to go on holiday in other countries both inside and outside the EU. Self-employed people are more likely than manual workers to spend their holiday outside the EU, by a margin of 29% to 18% (European Commission, 2014).

Map 2.5 Typology of regions by origin of tourists



Administrative boundaries: Eurostat GISCO, NUTS 2 (2016)

Typology of regions by origin of tourists, 2019

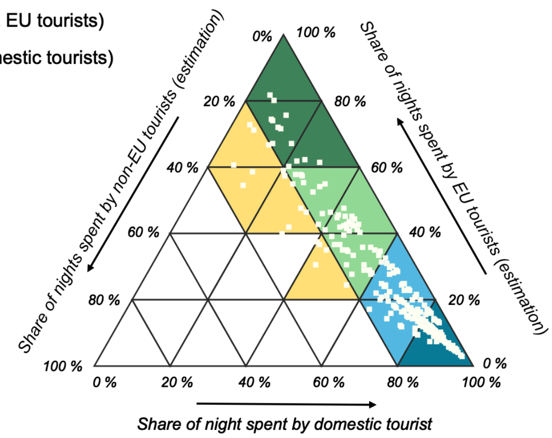
Mix of nights spent by domestic, intra-EU or extra-EU tourists

- Extra-EU tourist region (20-40 % extra-EU tourists)
- EU tourist region (60-80 % EU tourists)
- Domestic and EU tourist region (20-60 % domestic tourists & EU tourists)
- Mainly domestic tourist region with EU tourists (60-80 % domestic tourists)
- Domestic tourist region (80-100 % domestic tourists)
- no data

Source: own elaboration, based in the following data inputs

Dataset 'tour_occ_nin2' (accessed 05 January 2021, Eurostat), observatoire des territoires, enquète de fréquentation dans l'hôtellerie (accessed 05 January 2021, INSEE) and characterisation of tourism expenditure in EU regions (JRC).

Tourism expenditure by origin at national level is used as a key applied to all regions of a given country in order to disaggregate nights spent by foreign tourists into nights spent by intra-EU tourists and nights spent by extra-EU tourists.



Source: own elaboration

2.4 Regional dependency on tourism

Whether and how many tourists visit a destination matters more to the local and regional economy in some regions than in others. Employment in related sectors provides a good understanding of the importance of tourism for local and regional development. Ideally, this would entail calculating the share of employment related to tourism. In the best case, this would cover employment in tourist destinations as well as in other regions offering tourism related services (such as booking services, travel agencies, management of tourism businesses and tourist transport including flight carriers, airports and cruise liners).

Eurostat has identified NACE rev. 2 activities that are 'mainly related' and 'partially related' to tourism (see Table 2.1). However, as shown by Santos et al. (2020) such detailed employment in tourism-related activities is not available at NUTS2 level. Regional disparities can therefore be approximated using 'employment in accommodation industry' (NACE rev.2 category I55) and 'food and beverage services' (NACE rev. category I56). The accommodation and food service sectors make up 65% to 70% of employment in tourism (Figure 2.4). Therefore, they are a good proxy. A more elaborate approach to fully assessing employment depending on tourism might be beneficial but would most likely not change the overall regional picture.

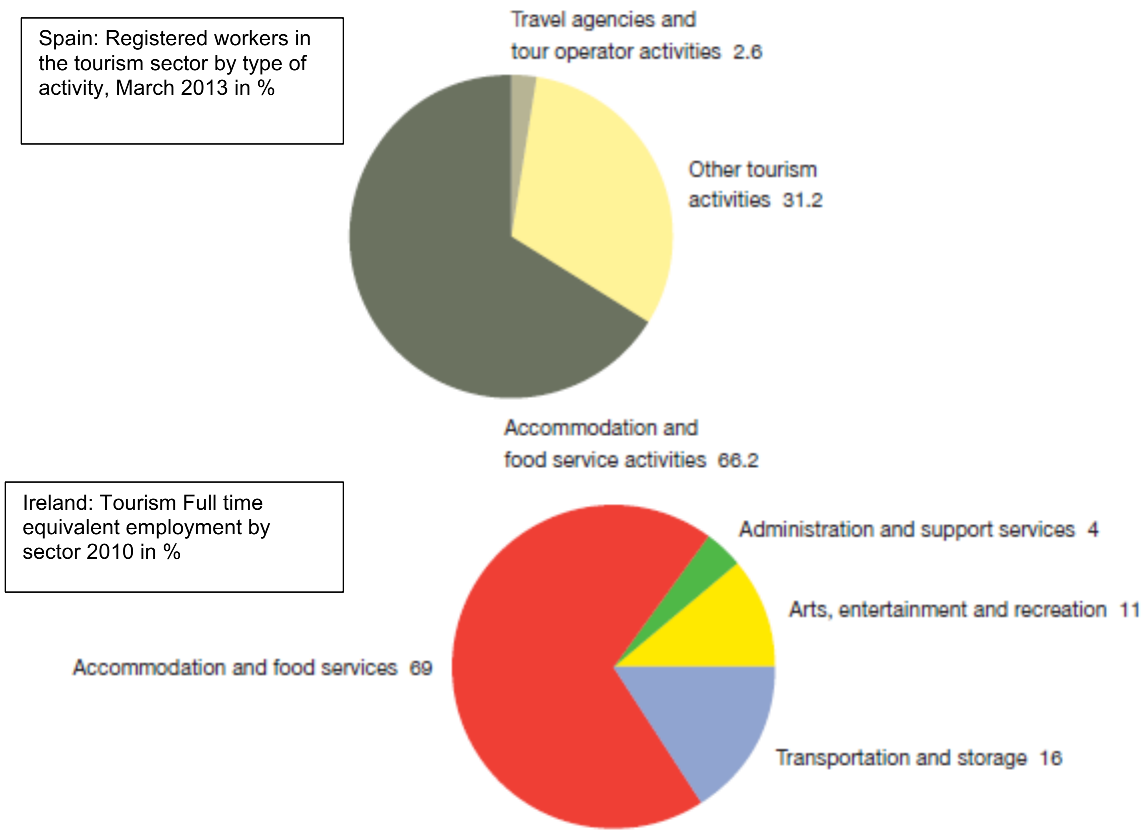
Table 2.1 NACE classification of tourism related activities

Category	Code	Description	Tourism-related
Land Transport	H4910	Passenger rail transport, interurban	Partially
	H4939	Other passenger land transport n.e.c.	
Water transport	H5010	Sea and coastal passenger water transport	Partially
	H5030	Inland passenger water transport	
Air transport	H5110	Passenger air transport	Mainly
Food and beverage services	I5610	Restaurants and mobile food service activities	Partially
	I5630	Beverage serving activities	
Accommodation services	I5510	Hotels and similar accommodation	Mainly
	I5520	Holiday and other short-stay accommodation	
	I5530	Camping grounds, recreational vehicle parks and trailer parks	
	I5590	Other accommodation	
Rental services	N7711	Renting and leasing of cars and light motor vehicles	Partially
	N7712	Renting and leasing of trucks	
	N7721	Renting and leasing of recreational and sports goods	
Travel agency and tour operators	N7911	Travel agency activities	Mainly
	N7912	Tour operator activities	
Cultural activities	R9004	Operation of arts facilities	Partially
	R9102	Museums activities	
	R9103	Operation of historical sites and buildings and similar visitor attractions	
	R9104	Botanical and zoological gardens and nature reserves activities	
Recreational activities	R9321	Activities of amusement parks and theme parks	Partially

Source: Santos et al. (2020, p. 34)

Marques Santos et al. (2020) shows that on average an additional 1,000 tourist arrivals are associated with 20 more jobs and this was consistent for most regions whatever their tourism intensity (except for regions in the top and bottom five centiles for tourism intensity). Regional employment generated by tourists can be estimated following this approach. Applying this to the number of tourist arrivals in all EU regions results in an estimated contribution of the tourism sector to employment along the value chain (direct, indirect, induced and catalytic effects in related activities) in 2017.

Figure 2.4 Weight of accommodation and food sector employment in tourism employment (Ireland and Spain)

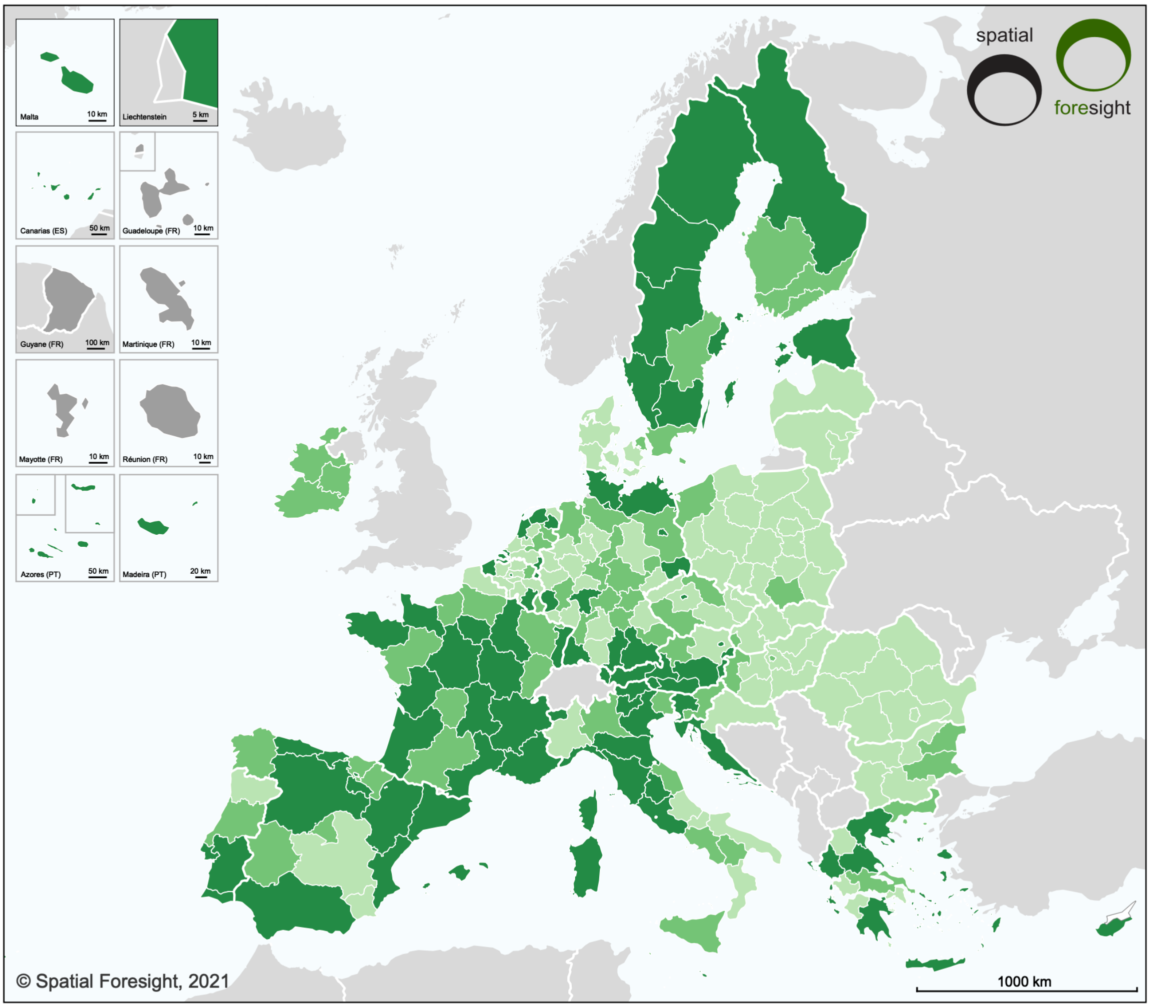


Source: UNWTO and ILO (2014, pp. 110 and 140)

At NUTS2 level, employment in tourism varies between 2% in Mazowiecki regionalny, the region surrounding Warsaw in Poland and 66% in South Aegean in Greece.

87 NUTS2 regions have more than 12% of their employment in tourism. These are mainly around the Mediterranean Sea, regions in Portugal, Spain and France also beyond the Mediterranean, the Alps, coastal areas of Belgium, the Netherlands and Germany, Estonia, Finland and Sweden. The 10 regions with the highest shares of employment in tourism are shown in Table 2.2. The picture is different when looking at total employment in tourism which is affected by the size of the NUTS2 region and its economy, see Table 2.3. Thus, the relative importance of tourism for the local and regional economy differs from the absolute importance for employment in Europe, reflected in increasing employment in tourism over past decades shown in Figure 2.6. This difference between relative and absolute employment can be important for development and policy making in a region. Going beyond absolute and relative numbers, Batista e Silva et al. (2018, p. 111) point out that seasonality also matters (cf. also section 0) to understand the importance of tourism for a region. They illustrate this with regions in Northern Europe that, despite modest numbers of tourists and modest employment in tourism, are significantly exposed to tourism due to its relative importance regionally and/or to high seasonality.

Map 2.6 Contribution of tourist arrivals to total employment



Administrative boundaries: Eurostat GISCO, NUTS 2 (2016)

Tourism contribution to employment, 2017

Contribution of tourist arrival to total employment

- low contribution of tourism to employment (< 8%)
- medium contribution of tourism to employment (8% - 12%)
- high contribution of tourism to employment (> 12%)
- no data

Source: data communicated by JRC and produced in the framework of the publication from Marques Santos, A, Madrid González, C.,Haegeman, K., Rainoldi, A. (2020). Behavioural changes in tourism in times of COVID-19. Employment scenarios and policy options. JRC Science for Policy Report. Publications Office of the European Union, Luxembourg, 2020, ISBN 978-92-76-20401-5, doi:10.2760/00411, JRC121262.

Tourism contribution to employment refers to the overall effect of tourist arrivals at accommodation establishments along the value chain (direct, indirect, induced and catalytic effects in related activities).

Source: own elaboration based on Santos et al. (2020, p. 18)

Table 2.2 Top 10 regions with the highest employment share in tourism

Region (NUTS2)	Share of employment in tourism
South Aegean (Greece)	66%
Ionian Islands (Greece)	48%
Adriatic Croatia	46%
Bolzano/Bozen (Italy)	44%

Table 2.3 Top 10 regions with the highest employment in tourism

Region (NUTS2)	Employment in tourism
Île de France	912,669
Catalonia (Spain)	571,078
Andalucía (Spain)	517,365
Veneto (Italy)	443,483

Tirol (Austria)	40%	Oberbayern (Germany)	404,502
Salzburg (Austria)	36%	Rhône-Alpes (France)	403,106
Canary Islands (Spain)	35%	Provence-Alpes-Côte d'Azur (France)	397,840
Corsica (France)	35%	Lombardia (Italy)	379,880
Algarve (Portugal)	34%	Noord-Holland (Netherlands)	324,747
Aosta valley (Italy)	34%	Tuscany (Italy)	321,629

Source: own elaboration based on Santos et al. (2020)

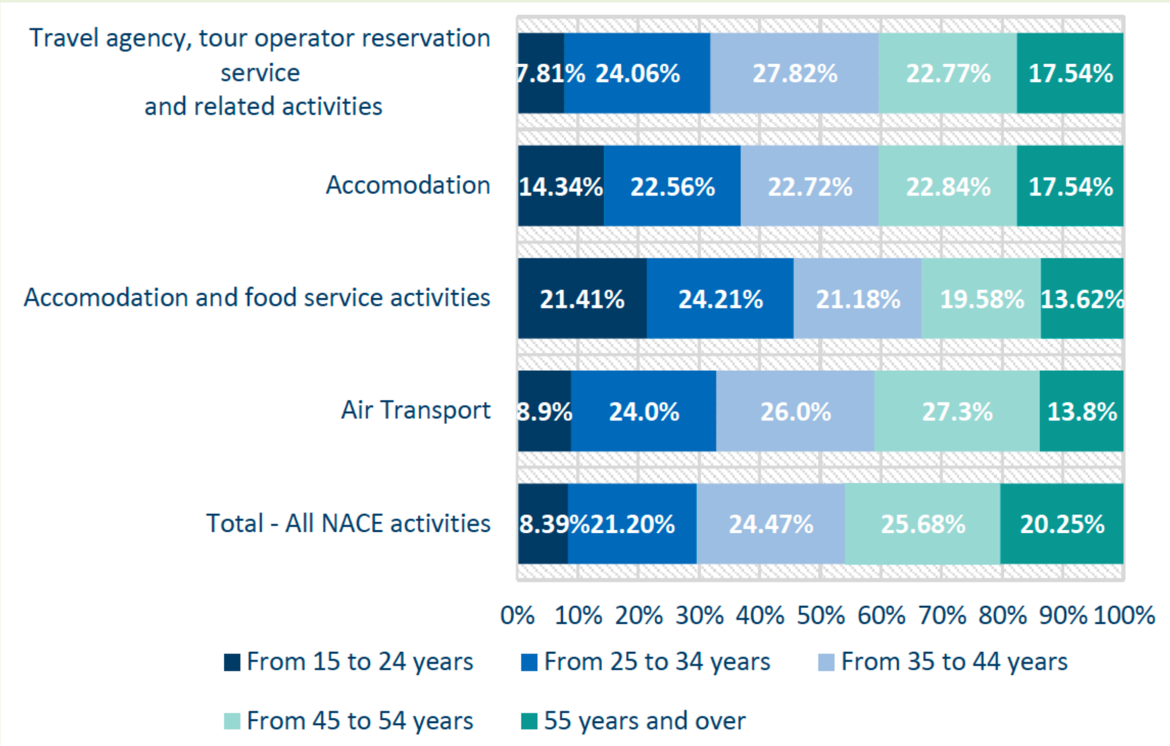
In most of Eastern and Central Europe tourism accounts for a low share of regional employment. The same is true for some regions in Germany, Belgium and the Netherlands.

Employment by age group

Compared to the total labour market, the tourism industry at destinations has higher shares of employments for younger people (see Figure 2.5). This also means that shocks in the tourism industry have a higher risk of contributing to youth unemployment.

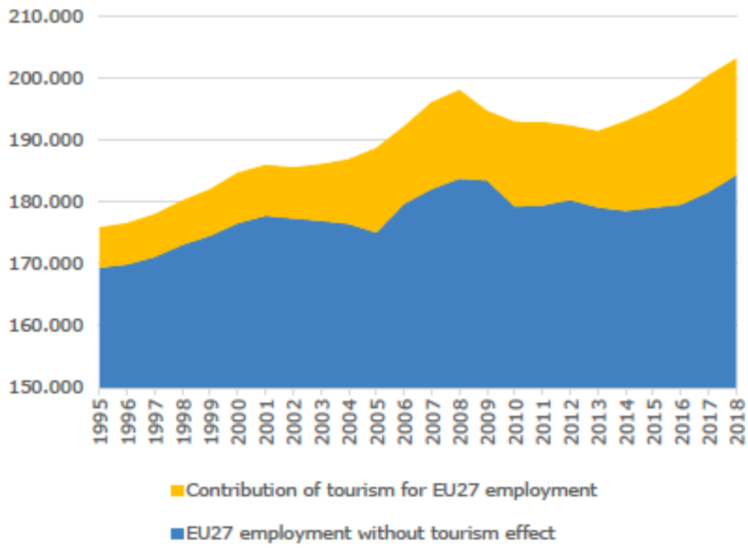
The age structure of people working in tourism independently of the destination (e.g. in travel agencies and air transport) is comparable to the general labour market.

Figure 2.5 Employment by sector and age group



Source: Nigohosyan et al. (2020, p. 22) based on based on DG GROW/Eurostat

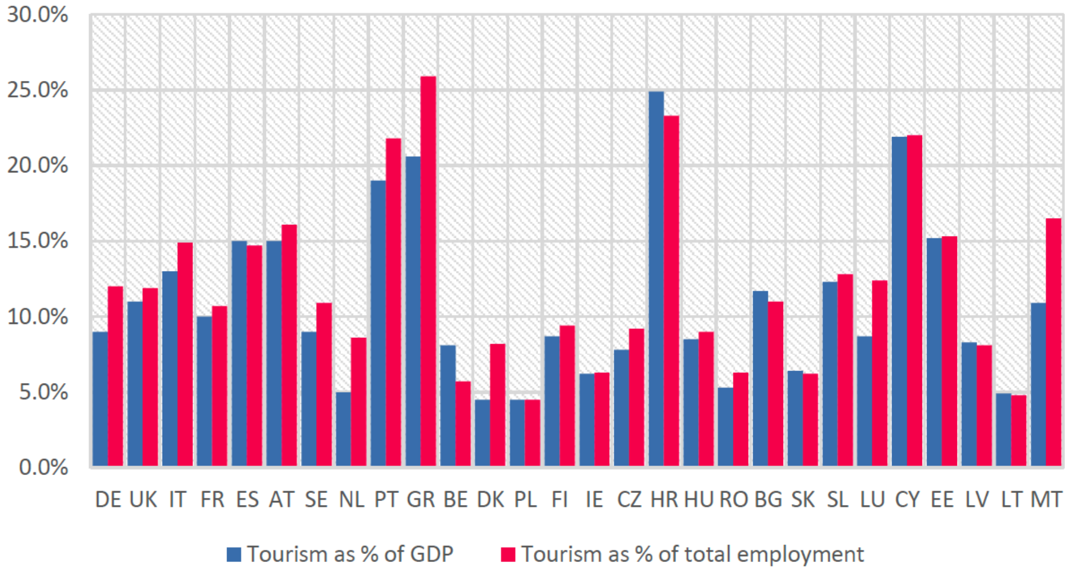
Figure 2.6 Contribution of tourism to regional employment, EU, 1995-2018



Source: Joint Research Centre (2020, p. 2)

The tourism industry is not only an important employer in large parts of Europe, it also contributes to economic growth. It is estimated that it directly and indirectly accounted for 10% of GDP in the EU28 (Batista e Silva et al., 2019, p. 4; CSES, 2013, p. 5). Similar to employment in tourism, the contribution to GDP varies substantially across countries. At the top of the list are Croatia, Cyprus, Greece and Portugal where tourism contributes 20-25% to GDP, compared with about 5% in Belgium, Romania, the Netherlands, Lithuania and Poland, as shown in Figure 2.7 (Nigohosyan et al., 2020, p. 21).

Figure 2.7 Contribution of tourism to GDP and employment in the EU (2018)



Source: Nigohosyan et al. (2020, p. 21) based on WTTC

Apart from these national differences there are detailed geographical differences within countries, where tourism contributes more to GDP in some places than in others. Unfortunately, there is no reliable information on this, as economic effects of tourism ecosystems are geographically dispersed. For instance in Greece economic links between the islands and the capital city area imply that half the added value generated on the islands flows to the capital region and 25% to other regions (Liargovas, 2020; Papanikos, 2020).

2.5 Preparedness and resilience

The tourism sector is extremely dynamic and constantly adapting to new demands, changing contexts and emerging offers in other areas. Accordingly, preparedness for resilience is key to ensure medium- to long-term regional tourism development. The importance of preparedness and resilience has been emphasised by the COVID-19 pandemic. The resilience of local and regional tourism ecosystems varies greatly depending on tourism industries in an area and their weight in the local and regional economy. Factors affecting resilience include:

- **Diversity of tourism products and target groups.** As usual, diversity helps resilience. A broad variety of tourist offers including specific purpose of travel (e.g. leisure, business or health) and type of activity or products (e.g. sun/beach, winter/skiing, active/mountain, natural/rural, urban/culture/heritage, shopping, MICE or gastrotourism) helps.

- **Good governance of the destination.** Regional tourism industries are complex ecosystems in which many different stakeholders need to cooperate. Good governance of destinations with trust, inclusiveness and transparency help to join forces and mobilise resources in times of shock.

- **Openness and innovation.** In particular with shocks or rapid changes, the ability to adjust to changing circumstances depends on preparedness but also on an openness to change and experimentation. Innovation capacity and culture also play a role. Adaptive, open and innovative destinations may adjust to changing circumstances more easily than those sticking to ‘old-habits’.

- **Access to funding and resources.** Implementing changes or outliving crises is also a matter of access to financial resources. Consequently, the ability to mobilise funding and investments can be important for resilience.

Resilience varies considerably across tourist regions in Europe and is also related to the size of a region’s economy, as larger economies often have more potential to diversify. There is no European-wide analysis of the resilience of regional tourism ecosystems. However, some indicators can stimulate a discussion on which regions might be more resilient to shocks.

Firstly, the share of tourism in the regional economy matters (see also section 2.4 on regional tourism dependency). This does not show how diversified a region’s tourism ecosystem is but provides insights on economic diversity beyond tourism in a region.

Secondly, the quality of government and governance (cf. Charron et al., 2019) shows how the decision making environment is a pre-requisite for long-term, sustainable strategies, access to basic services, social trust and political legitimacy (Rodríguez-Pose & Ketterer, 2020). The 7th Cohesion Report (European Commission, 2017) underlines that high-quality government plays a vital role for the well-being of a society.

Thirdly, innovation strategies targeting tourism ecosystems provide a proxy for openness and innovation in a region. This can be expressed by tourism being addressed in research and innovation strategies for smart specialisation (RIS3).[4]

Following this rationale, regions with the lowest resilience to shocks for tourism are Adriatic Croatia, North-eastern Bulgaria, Budapest, and the Italian regions of Liguria, Basilicata and Umbria, as they have comparably high shares of employment in tourism (see section 2.4) but low quality of government and no RIS3 addressing tourism (see Map 2.7).

[4] See https://s3platform.jrc.ec.europa.eu/map

Quality of government and governance

The quality of government and governance becomes increasingly important for regional and local development, as traditional factors such as infrastructure, human capital and technology can explain some variations in regional development in Europe. Since quality of government and governance positively impacts the marginal utility of investment in infrastructure, human capital and technology then public investments need to emphasise government and governance efficiency-enhancing measures. In principle successful public investment relies on a sound investment environment including decision-making processes and a wider planning framework.

- **Accountability, transparency and anticorruption.** An analysis of governance quality shows that disparities within Europe tend to be stable but have large scale geographical patterns. To improve the quality of government, public investments need to build capacity in eastern and southern Europe. Furthermore, any public investment beyond EU Cohesion Policy needs to strengthen accountability, transparency and anticorruption to support higher quality government. This concerns all levels of government.

- **Capacity building.** Increasing the quality of government and governance processes, especially smaller local and regional players often meets capacity limits. Public investments are needed to build and maintain capacity, possibly also through pooling, or the ‘central’ provision of capacities.

- **Trust building.** The quality and efficiency of governments and governance processes also have to do with citizens’ trust in public decision-making processes. With increasing discontent and fragile or even declining public trust, especially among economically disadvantaged groups, there is a case for the broader involvement of people and localities in investment and policy decisions. Large scale investments should involve participatory or co-creative processes bringing citizens on board.

- **Better planning.** Physical investments also require engagement with local and regional planning procedures. Local and regional planning and its integration into investment decision processes varies considerably across Europe. This also concerns public consultation, which is critical to addressing the perception of spatial inequality. Therefore, investment decisions should be properly linked to the local and regional planning process.

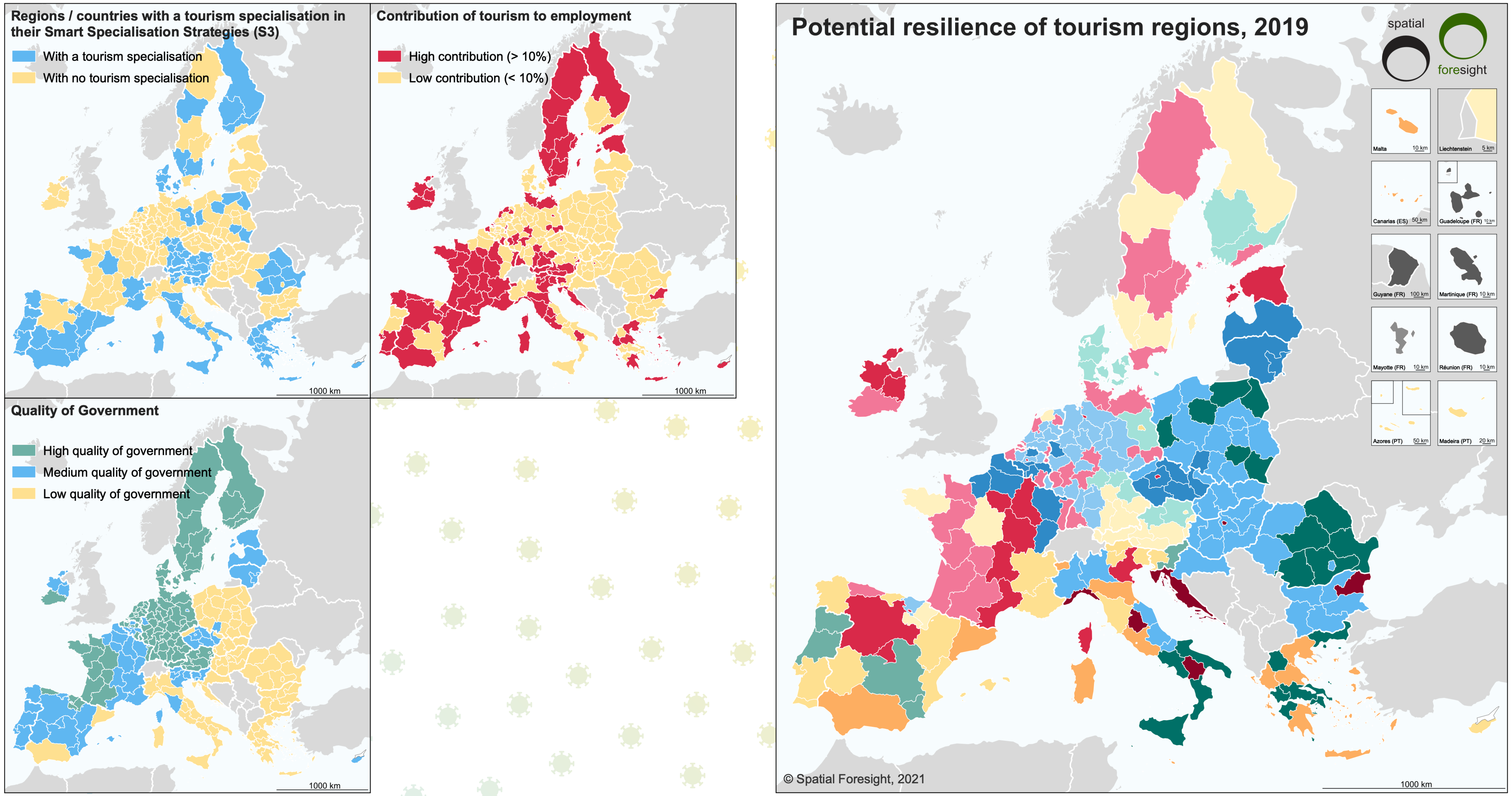
Corruption, greater accountability and stakeholder involvement is needed if low-growth regions are to experience sustainable levels of development and greater convergence towards the rest of the EU.

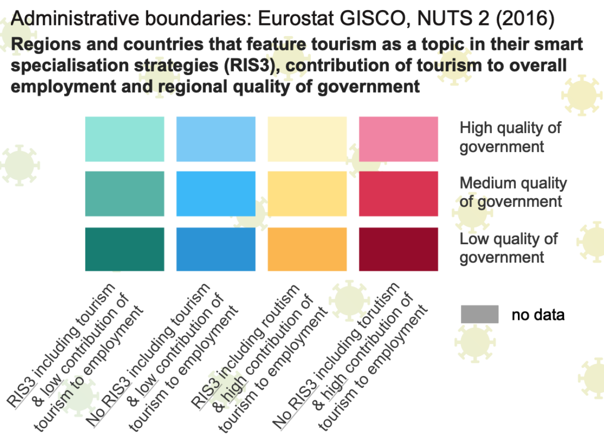
Most regions with high levels of tourism employment and low quality of governance have at least one RIS3 addressing tourism, which means they should be better prepared for change. Among these are North Aegean, South Aegean, Crete, Central Macedonia, Epirus, Thessaly, the Ionian Islands, and Peloponnese in Greece, Andalucía, Valencia, Canary Islands and Balearic Islands in Spain, and Sardegna, Emilia-Romana, Friuli-Venezia Giulia, Lazio, Valle d’Aosta and Tuscany in Italy (see Map 2.7).

The potential stars in terms of resilience are regions with high levels of tourism employment, high quality of governance and a RIS3 addressing tourism. Among these are the Austrian regions of Tirol, Salzburg, Kärnten, Vorarlberg, Burgenland, Styria and Vienna. Furthermore, large parts of Bavaria and Berlin in Germany, Northern Finland, Friesland in the Netherlands, as well as Middle Norrland, West Sweden and Småland & islands in Sweden fall into this group (see Map 2.7).

In relation to the 2021-27 Cohesion Policy classification of regions, less developed regions are somewhat better prepared than more developed or transition regions, those with high shares of employment in tourism tend to also have RIS3 addressing tourism. This is the case in only 50% of more developed and transition regions. At the same time, the vast majority of less developed regions have low quality governance , while most of the more developed regions have high quality governance. Less developed regions also usually score lower on the Regional Innovation Scoreboard analysing the performance of regional innovation systems (European Commission, 2021c). This means that many developed and transition regions would benefit in 2021-27 from more strategic support for their tourism ecosystems e.g. via RIS3 or specific strategies on tourism recovery. Less developed regions that already build on strategic plans would benefit from developing more and better governance and innovation capacities to retain a larger share of the tourism value chain in their region.

Map 2.7 Teaser on the resilience of (tourism) regions





Source: own elaboration based on the following data inputs

Information on RIS3 (Smart Specialisation Platform Eye@RIS3 Innovation Priorities in Europe), quality of government index (University of Gothenburg) and contribution of tourism to employment (data communicated by JRC and produced in the framework of the publication from Marques Santos, A., Madrid, C., Haegeman, K. and Rainoldi, A. (2020). Behavioural changes in tourism in times of Covid-19. Employment scenarios and policy options. JRC Science for Policy Report. Publications Office of the European Union, Luxembourg, 2020, ISBN 978-92-76-20401-5, doi:10.2760/00411, JRC121262).

Tourism contribution to employment refers to the overall effect of tourist arrivals at accomodation establishments along the value chain (direct, indirect, induced and catalytic effects in related activities).

For cases where information on smart specialisation strategies is available only at NUTS 3 level, the information whether tourism appears as topic in the smart specialisation strategy or not, was up-scaled to the parent NUTS 2 region.

Source: own elaboration

2.6 Towards a regional typology

Types of tourism destinations, seasonality, origins of tourists, economic dependency on the tourism sector and preparedness or resilience to shocks in the sector are all important to understanding the multifaceted nature of tourism regions in Europe.

For individual regions, these pieces can be brought together into a comprehensive picture and enriched with more tacit knowledge and information. A comparative European picture and regional map needs to be more selective. Following the discussions above, the importance of tourism for regional employment and the origin of tourists are a good basis for defining basic types of tourist regions (see Map 2.8).

Regions where tourism is important for the local economy can be differentiated by the origins of tourists and by illustrating the profile and sensitivity of tourism ecosystems:

- **High share of employment in tourism catering largely for domestic tourists.** About 20% of the NUTS2 regions in EU-27 fall into this category. They have a high share of employment in tourism, and more than half the nights spent are by domestic visitors. These are mainly in Finland, Sweden, Germany, the Netherlands, France, Spain and Portugal.

- **High share of employment in tourism catering largely for European tourists.** About 15% of NUTS2 regions in the EU-27 fall into this category. They have a high share of tourism employment and more than half the nights spent are by visitors from other EU countries. Among these are Malta, Estonia, Berlin in Germany, Zeeland and Noord-Holland in the Netherlands, Brussels and Province Luxembourg in Belgium, Ile-de-France and Alsace in France, Catalonia, the region of Valencia and Andalusia, Canary Islands and Balearic Islands in Spain, the regions of Lisbon, Algarve, Azores and Madeira in Portugal, Vale d'Aosta, Liguria, Tuscany, Lazio (Rome) and Sardinia in Italy, Adriatic Croatia, Epirus, Thessaly, Central Macedonia, Peloponnese and North Aegean in Greece, Vorarlberg Salzburg, Tirol, Kärnten and Vienna in Austria.

- **Medium to high share of employment in tourism catering for relatively high share of global tourists.** About 4% of NUTS2 regions fall into this category. They are regions with a high share of tourism employment and a high share of nights spent by visitors from outside the EU. Among these are Veneto, Bolzano/Bozen in Italy, Western Slovenia, South Aegean, the Ionian Islands and Crete in Greece, Cyprus and Prague in the Czechia. This is followed by about 2% of NUTS2 regions with a medium share of employment in tourism and a high share of nights spent by visitors from outside the EU. Among these are Bucharest in Romania, Northeast and Southeast Bulgaria, regions around Helsinki in Finland and Dublin in Ireland.

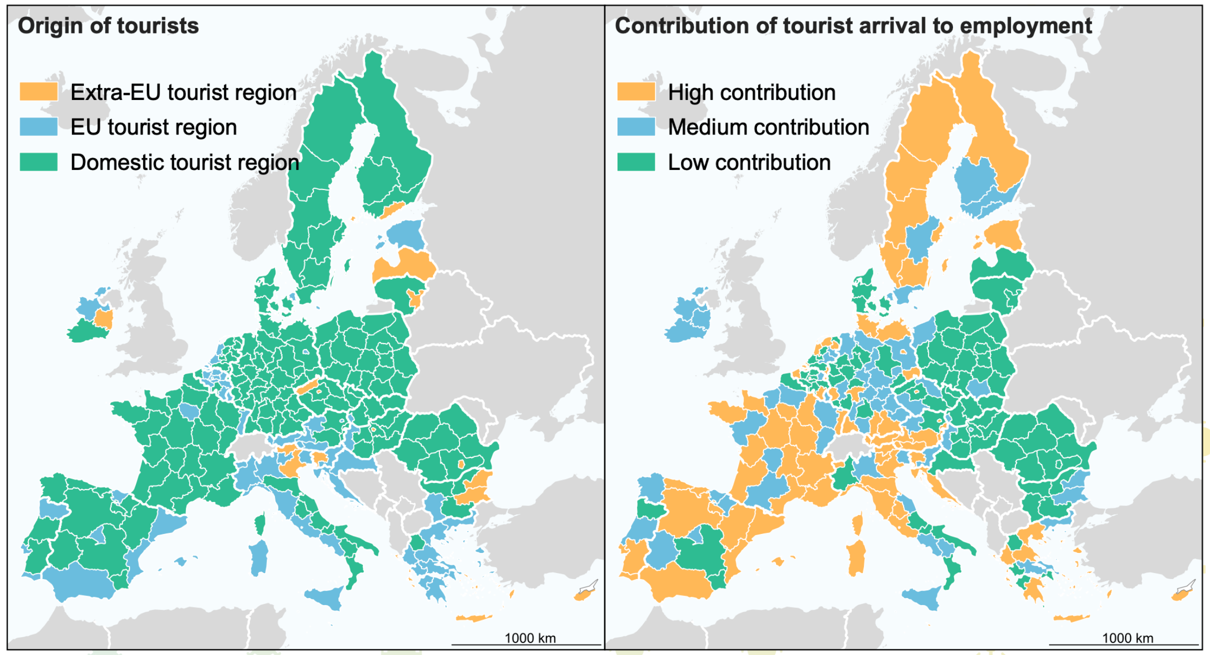
- **Low to medium share of employment in tourism catering for domestic tourists.** About 45% of the regions fall into this group. Areas with relatively low shares of employment in tourism are in most cases predominately visited by domestic tourist. About 29% of EU-27 NUTS2 regions have low shares of employment in tourism and more than half the nights spent are by domestic visitors. Most parts of Romania, Hungary, Slovakia, Czechia, Poland but also many regions in Germany and some regions in outer countries fall in this group. Another 17% have medium shares of employment in tourism with more than half the nights spent by domestic visitors.

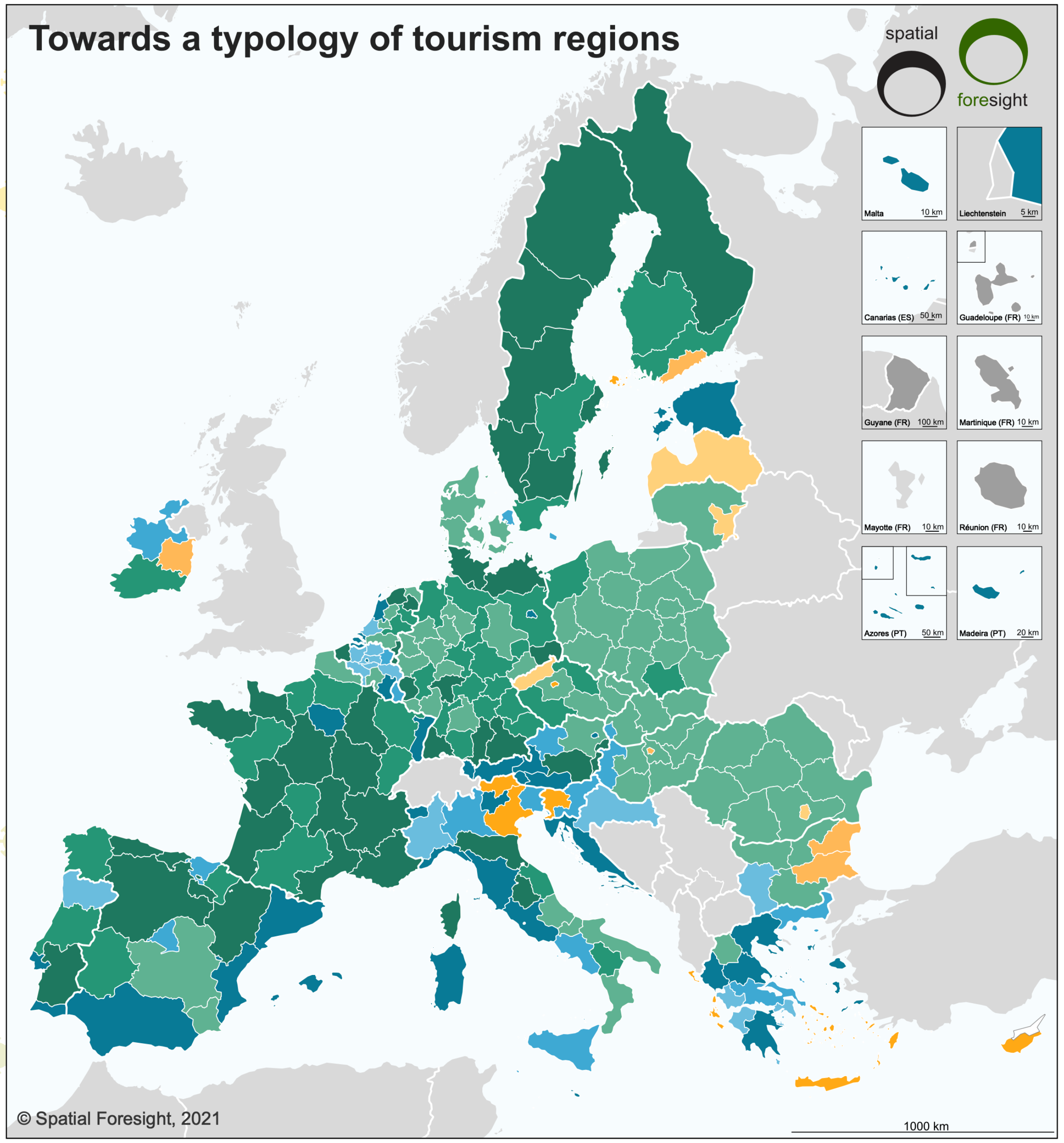
In addition, in about 11-12% of the regions more than half the nights spent are by visitors from other EU countries and the share of employment in tourism is low or medium. Four regions have comparably high shares of global tourists, while employment in tourism is low. These are the two Latvian regions, Bucharest region in Romania and the region around Carlsbad in Czechia.

This enables a first definition tourism region types which can help more place sensitive policy debates. European-wide comparable data does not cover the full complexity of tourism regions, their profiles and development of their specific tourism ecosystems. Adding qualitative features to quantitative characteristics enables a more nuanced understanding. This way specificities can be taken into consideration, such as the type of landscape and natural environment of the destinations, the tourism products, types of accommodation and transport that tourists prefer, as well as the maturity of the destination.

In a first combined quantitative and qualitative classification of European tourism regions, six types– each including various sub-types – have been identified and named after typical holiday drinks: 'Beach Beauty, 'Jagertee', 'Sea Breeze', 'Spritz', 'Sea meets Sky' and 'Cosmopolitan'.

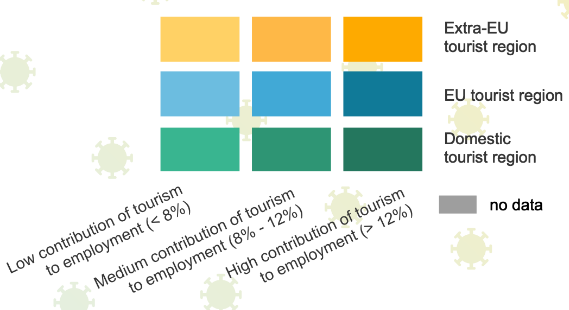
Map 2.8 Towards a typology of European tourism regions





Administrative boundaries: Eurostat GISCO, NUTS 2 (2016)

Typology by origin of tourists and contribution of tourism to employment



Source: own elaboration based on the following data inputs

Origin of tourists (own elaboration, based on dataset 'tour_occ_nin2' (accessed 05 January 2021, Eurostat), observatoire des territoires, enquète de fréquentation dans l'hôtellerie (accessed 05 January 2021, INSEE) and characterisation of tourism expenditure in EU regions (JRC)) and contribution of tourism to employment (data communicated by JRC and produced in the framework of the publication from Marques Santos, A., Madrid, C., Haegeman, K. and Rainoldi, A. (2020). Behavioural changes in tourism in times of Covid-19. Employment scenarios and policy options. JRC Science for Policy Report. Publications Office of the European Union, Luxembourg, 2020, ISBN 978-92-76-20401-5, doi:10.2760/00411, JRC121262).

Typology is assessed based on the regional share of overnight stays from extra-EU tourists, EU tourists or domestic tourists and the tourism contribution to employment, which refers to the overall effect of tourist arrivals in accomodation establishments along the value chain (direct, indirect, induced and catalytic effects in related activities).

Source: own elaboration

2.6.1 Tourism region type 'Beach Beauty'

Many European coastal tourism regions are centred on sun and beach with many tourists, mainly from other EU countries. Hotels are the predominant accommodation, while air transport is the preferred way to travel. Even though it is often seasonal, this tourism contributes strongly to regional employment and value generation. Variations include coastal regions with a high share of sun and beach tourism but less seasonality. The French Riviera is an example with sun and beach tourism, but with a much higher share of tourists from non-EU countries.

Balearic Islands – a prominent example for a 'Beach Beauty' region

The Balearic Islands in Spain are an example of a European coastal tourism region centred predominantly on sun and beach mass tourism. Most tourists are interested in beach activities (75%), even though there are many other cultural and natural activities. The predominant model is based on high numbers of tourists, mainly using hotels (70%) with a high share of packages organised by travel agencies and tour operators (42% of German tourists travel with a package) (Turespaña, 2020). The Balearic Islands have a high share of tourists from other EU countries – in 2019, only 17% of tourists were from Spain whereas the rest came from other countries, in particular Germany (28%) and the UK (23%). Most tourists arrive by plane – Palma de Mallorca airport is one of the busiest airports in Spain with 2014 almost 16 million passenger arrivals in 2014, increasing to 20.6 million passengers in 2019 (AETIB, 2020).

Tourism activity and travel to the region is seasonal and largely between March and October with peaks in July and August. For example, in the summer of 2018 almost 200,000 people were working in tourism activities, that was 32% of the workforce in the region. Of these, 42% were working in the accommodation sector, 32% in restaurants, bars and gastronomy, 10% in transport and 16 % in other tourism sectors. Despite the seasonality, 70-75% of tourism employees have long-term contracts, only 25-30% have temporary contracts. Tourist expenditure averages EUR 150 per day per tourist, adding up to EUR 16.5 billion in 2019. Tourism and its related sectors have a high weight in the regional economy. A 2015 study estimated that tourism made up 45% of the Balearic economy at the end of 2014 (compared to 11% for Spain). For 2010-2014, tourism grew by an average of 3.5% year-on-year, compared to 0.6% for the island economy as a whole. This confirms the leading role of tourism in the recovery of the Balearic Islands economy after the 2008-2010 crises (Exceltur y Govern Balear, 2015).

The Balearic Islands' economy has been severely affected by the COVID-19 pandemic, with a 41% drop in GDP between April and June compared to the previous year. The cumulative figure from January to September 2020 was a drop of 81% in the number of tourists, compared to 2019. The drop was more accentuated among foreign tourists (87%), than nationals (49%). The decrease in tourism is unprecedented and the forecast fall in value added for the Balearic Islands in 2020 was 29% (Spain: 12%, Eurozone: 8%, as of November 2020). First crisis response measures ensured some activity in June, July and August 2020. During the second half of June, the Balearic Islands regional government, together with the central government and private agents, announced the first safe travel corridor within Spain. The Pilot Plan created an air bridge between the Balearic Islands and Germany, allowing temporary reactivation of the tourism sector in the Balearics. In addition, the Balearic Islands Agency for Tourism (AETIB) launched two online marketing campaigns from June to August 2020. (NECSTouR, 2020a)

2.6.2 Tourism region type 'Jagertee'

Some European regions focus on mountain-based tourism related to natural and sports activities, mostly skiing in winter and hiking in summer. Tourism contributes strongly to regional employment and value generation. Regions usually have strong winter and summer seasons. Variations include, for example, mountain regions with much more domestic than EU-international tourism (e.g. Sweden, Spain, Central-Eastern Germany, Bulgaria, Slovenia as well as Northern and Central Greece), as well as regions that are less well developed and internationally less known to travellers such as mountain regions more at the beginning of their tourism lifecycle in Poland, Czechia, Slovakia, Romania and Croatia.

Tyrol – a prominent example for a 'Jagertee' region

Tyrol is an example of European mountain-based tourism – concentrated in the Alps – related to natural and sports activities, mostly skiing in winter and hiking in summer. Tourism has a long tradition in Tyrol. Until the end of the 19th century 'transit tourism' dominated as Tyrol lay at the intersection of important north-south and east-west connections. At the beginning of the 20th century demand for Tyrol as a holiday destination increased. Visitor figures are high, but usually equally spread between winter and summer months. In the winter season 2018/19, Tyrol received 6.2 million visitors, the same as in summer 2019, with a total of 12.4 million visitors for 2018/2019. Tourism in the Alps has reached a high level of maturity. Since the 1980s, winter and summer tourism has been well established and increased only slightly in recent years. Before 2020, Tyrol saw shorter but more frequent holidays – the average stay fell from 4.7 to 4.0 days over the last 10 years. Lodging is largely in hotels (2/3), while rented houses and apartments are increasing as alternative accommodation. Only 8% of tourists come from Austria, while over 62% come from Germany and the Netherlands. Except for Swiss and Liechtenstein citizens, non-EU countries (e.g. Russia, China, USA, Israel) do not play an important role in visitor figures (Tirol Tourism Research, 2020).

Tyrolean tourism employs around 55,000 people. 58% in the accommodation sector and 26% in gastronomy, while 12% are related to sports, leisure and wellness activities. In some districts, tourism makes up to 42% of employment. In a 10-year comparison, the number of tourism employees rose by 42%, more strongly than in any other economic sector in Tyrol. Average daily expenditure per tourist is higher in winter (EUR 185) than in summer (EUR 137). Tourism in Tyrol generates EUR 8.4 billion in turnover, EUR 6.7 billion from overnight tourism and EUR 1.7 billion from day tourists. The gross added value generated by tourism is 17.5% of overall value added in Tyrol, which is significantly higher than the national average (6.5%) or in other regions like Upper Austria (4%) or Vienna (2.2%) (Tirol Tourism Research, 2020; Tirol Werbung, 2020).

The first four months of the 2019/20 winter season from November to February saw a significant increase in both arrivals and overnight stays compared to the previous year. Then, on 13 March, the winter season ended early due to corona. As a result, the winter season had 22.9 million overnight stays (-17%) and almost 5 million arrivals (-20%), significant declines compared to the previous year. From May until July there was a constant improvement so in August there was a drop of only 7% compared to the previous year. This was led mainly by the high performance of rural areas with domestic and European (mainly German) visitors who were not allowed or confident to travel to other destinations. The number of infections rose in September, which led to further travel warnings. As a result, the industry again had to accept significant declines compared to the previous year. 15.6 million overnight stays (-30%) and almost 3.8 million arrivals (-39%). However, the average length of stay significantly increased in the summer from 3.6 to 4.1 days. With on-going travel restrictions and warnings in place, the winter season 2020/2021 was highly affected. For November to December 2020, 265,700 overnight stays (-95% compared to 2019) and 49,400 arrivals (-97%) were registered. Tyrol has been very active in finding response and recovery measures, for example, designing and implementing health and safety guidelines for the winter season 2020/2021, communicating health and safety measures and focusing on safety marketing (NECSTouR, 2020a).

2.6.3 Tourism region type 'Sea Breeze'

This describes rural tourism in coastal territories with a high share of domestic tourism. A distinctive feature is that the number of tourists is generally lower than in 'Beach Beauty' regions, while travel and accommodation is mostly by car, staying in holiday homes, rural houses or camping sites. Regions mostly attract domestic tourists or people from neighbouring countries. Overall, tourism's contribution to employment and value-added is low, but in certain regions it can be medium-high due to a lack of other economic sectors. This is generally comparable to other coastal regions, mostly in the northern, eastern and western parts of Europe where domestic tourism and tourism from neighbouring countries is dominant. Similar examples can be found in Nordic and Baltic countries, but also in Germany, the Netherlands and Ireland. A slightly different sub-type refers to coastal regions close to larger cities and metropolitan areas with more visitors, a significant share of day-tourism and more hotel accommodation. Examples are the German Baltic Sea coast in Mecklenburg-Vorpommern, and parts of the Dutch, Belgian and French coasts. Another sub-type refers to coastal regions that have a high share of hotel accommodation and receive significant shares of EU-international and even extra-EU visitors but are not (yet) so massively visited they are 'Beach Beauty' regions. This covers regions in Northern Spain, Atlantic Coast of France and Portugal.

The Danish West Coast – a prominent example for a 'Sea Breeze' region

The West Coast of Denmark is an example of rural tourism in a coastal territory with a high share of domestic tourism but also EU tourists mostly from neighbouring countries. A distinctive feature is that trips are normally individually organised (travel by car or caravan). The network of roads is crucial, especially in southern and central parts of the West Coast region where many tourists (particularly Germans) arrive by car. The West Coast has three airports, with Aalborg and Billund having many international routes. However, these are less important for tourism. The port of Hirtshals has many international ferry routes, linking the West Coast to the Norwegian market in particular.

The West Coast contains a number of well-established destinations with a long history. It has a 500-kilometre open, pristine and accessible coastline, as well as attractive, varied natural landscapes. There is a string of small and medium-sized coastal towns in eleven Danish municipalities, all of which are on the North Sea: Frederikshavn, Hjørring, Jammerbugt, Thisted, Lemvig, Holstebro, Ringkøbing-Skjern, Varde, Esbjerg, Fanø and Tønder. Nature and the coastline are the greatest attractions with two national parks, a UNESCO heritage site, a geopark and several noted natural landscapes. Specific cultural and leisure centres are complementary, e.g. Fårup Sommerland, LEGOLAND Billund and the North Sea Oceanarium. Cultural events (e.g. festivals) and attractive gastronomic experiences and restaurants add to attractions for tourists. The North Sea Cycle Route is a continuous 550-kilometre cycle and walking route on the West Coast, connecting Skagen in the north with Rudbøl in the south (Invest in coastal tourism in Denmark, 2021).

In 2019, the region had 19.7 million overnight stays. Holiday homes or cottages (for rental) are by far the predominant type of holiday accommodation in the area. 65% of commercial overnight stays on the West Coast are in holiday homes, 18% are on camping sites and 18% in hotels or resorts. Close to one in four holiday homes in Denmark are on the West Coast. The predominance of these homes means that the supply of accommodation facilities is relatively one-sided, and several large destinations have a shortage of capacity in the high season. On average, 34% of tourists come from Denmark and 56% from Germany. Other international visitors come mainly from Norway, Sweden and the Netherlands. The number of overnight stays increased between 2015 and 2019 by 17%. Most people come during summer, but seasonality has some effect on the local economy with fewer tourists but there are activities for weekend excursions and day-tourists in the winter season (Invest in coastal tourism in Denmark, 2021).

A 2019 study estimates that some 32,500 full-time jobs depend on coastal and maritime tourism in Denmark. West Coast employment in this type of tourism at municipality level contributes to between 2% and 5% of employment per municipality. Added value from coastal and maritime tourism is relatively large in outskirt coastal municipalities of west and north Jutland. Per municipality they contribute 2% to 6% of value added. Coastal and nature related tourism in 2015 generated 46% of tourism revenue for the Danish economy, while city and business tourism accounted for 25% and 28% (CRT, 2019).

The COVID-19 impact on tourism was notable but not totally negative. Tourism on the West Coast of Denmark recovered in Summer 2020 largely due to the southern border reopening and an increase in domestic tourism. After three months of less tourism (April, May, June), the number of overnight stays in July increased by 8% compared to July 2019 (from 2,974,031 overnight stays in July 2019 to 3,198,107 in July 2020). The number of rented holiday homes for July to October 2020 in Denmark exceeded the 2019 figures. Only in November and December 2020 were the figures slightly lower than in 2019, mainly due to new travel restrictions in Germany. Overall, 2020 overnight stays only dropped by 4% compared to 2019. Still, lockdowns and restrictions also had a considerable impact on restaurants, amusement parks, event and entertainment managers, artists and cultural organisations. For regional response measures, tourism destinations have been kept in close contact with tourism industries who offer help and advice on measures offered by the national government and in regard to gradual reopening. Measures on digital transformation, mapping new initiatives and the development of (virtual, hybrid, safe) events have taken high priority. (NECSTouR, 2020a)

2.6.4 Tourism region type 'Spritz'

Many rural inland and/or mountain regions in Europe are less densely populated. At the same time, most of them have a peculiar attractiveness due to specific landscapes or cultural/natural heritage sites, but also because of a high concentration of cultural, folklore and gastronomic traditions. Many of them are in or close to natural reserves and protected areas. In these inland rural tourism regions, the number of visitors is generally low and largely domestic. However, tourism is quite intensive when overnight stays and visitors are seen in proportion to a smaller population. Tourism is usually seasonal, but all year round, visitors come for short stays, bank-holiday trips or visits with family and friends. Same day visits play an important role among visitor numbers as well as for revenues from tourism-related activities. Lodging is predominantly in holiday (rural) houses, camping/ caravan sites or linked to agritourism farms. A lack of alternative economic activities means the share of employees and revenues related to tourism can be high, even if the absolute figures are low. Most of these destinations have had growth in recent years, but less than other types of tourism regions, in particular city tourism regions. This tourism region type can be found in inland Portugal, Spain, Italy, Greece, France, Belgium, Germany, Ireland as well as Sweden and Finland. A sub-type refers to rural regions that are at the beginning of the tourism lifecycle and still have few visitors but an important growth potential. Examples can be found in Poland, Slovakia, Czechia, Bulgaria, Romania, Hungary. Some of these rural tourism regions in Europe extend across borders and require a cross-border consideration of visitor and destination management. In some cases, significant growth in recent years has led to a need for professional visitor management systems or restriction measures since these destinations cannot accept lots of visitors without significant ecological impact. Examples are Lapland (Finland) and Northern Norway.

The Eifel – a prominent example for a 'Spritz' region

The Eifel can be considered an example of rural inland tourism region in Europe. The Eifel is a low mountain range in western Germany and eastern Belgium. It fills parts of southwestern North Rhine-Westphalia, north-western Rhineland-Palatinate and the southern area of the German-speaking Community of Belgium, covering an area of

5,300 km². Part of the North Eifel has been designated as the Eifel National Park. There are also four nature parks in the area. In the east and south it is bounded by the Rhine and Moselle valleys. Features of the Eifel are natural lakes of volcanic origin.

In 2019, the Eifel in Rhineland-Palatinate received some 1 million visitors who spent 3.6 million nights in the region. This is roughly a 1% increase compared to the previous year. Only 27% of visitors (29% of overnight stays) come from other countries (mostly neighbouring countries), while 73% are domestic visitors. 80% of the foreign visitors come from The Netherlands and Belgium. The average duration of stays in the Eifel is 3.3 days, confirming the predominance of short stays and weekend trips. The most prominent form of lodging is hotels (24% of nights), but many other forms of accommodation (holiday houses, holiday centres, youth hostels, spas and rehabilitation clinics, health resorts) are also highly important. 30% of nights are spent in one of the 16 spas, rehabilitation clinics or health resorts in the region. Almost 25% of all nights are spent in one of the 6 holiday villages in the region. There is a high share of same-day visitors, but it is difficult to calculate this for the Eifel. Roughly, 6 million same-day visitors can be added to the overnight visitors. (dwif e.V. & Consulting, 2016; Ellermeyer, 2018; Statistisches Landesamt Rheinland-Pfalz, 2020).

There is a weak seasonality. Most visitors come between April and October but there are a significant number of visitors also in the other months. Despite the low total numbers, tourism intensity is high in proportion to the local population. In 2017, there were 9,111 overnight stays per 1,000 inhabitants, significantly higher than the national average (5,957) (Ellermeyer, 2018).

A 2017 study calculated that gross revenue in the sub-destination was EUR 190.5 million, one third from same-day visitors and two thirds from overnight guests. Accommodation, food and beverages, retail and other services are the main sectors benefitting from this. Employment in tourism is low, as many people have another job (in agriculture, shops, other services) dedicating some of their time to tourism, for example by offering private rooms or wine catering on the weekend. For the whole region of Rhineland-Palatinate, it is estimated that 7-10% of jobs are tourism related. For some areas in the Eifel, this figure might be considerably higher (dwif e.V. & Consulting, 2016, 2017).

In recent years, many innovative tourism products have emerged in the Eifel. In addition to traditional recreational and nature hiking and bike tourism, specific sub-regions have developed concepts to attract medical and health tourism (‘GesundLand Vulkaneifel’), low-carbon and climate-neutral tourism (www.klimatour-eifel.de/) or promote the Eifel National Park as a certified ‘star park’ where observation of the Milky Way is possible in the exceptionally dark sky.

The COVID-19 impact on tourism is notable but not only negative. While overall arrivals fell by 36% compared to 2019, the decline of overnight stays was less severe (31%). Figures for July to September 2020 were almost at the level of the previous year. While there was a considerable decline for hotel nights, there was an increase in nights spent in holiday homes and flats as well as on camping and caravan sites. During the summer months many people from Germany replaced their usual summer holiday abroad with longer stays in the Eifel and other domestic destinations, leading to a boom for some regions. However, effects from total lockdowns in the spring (March-May) and autumn (October-December) still had a devastating impact on businesses (Statistisches Landesamt Rheinland-Pfalz, 2021). In summer 2021, parts of the region were severely affected by heavy floods, showing the vulnerability of the region to climate change. This might add to an increasing awareness of climate-neutral tourism in the near future.

2.6.5 Tourism region type ‘Sea meets Sky’

The EU outermost regions represent a specific form of tourism region. Their location and distance from continental Europe, (usually) pleasant climate and temperature compared to the European continent and the 'exotic' nature and living conditions influence the type of tourism they attract. Outermost regions are an integral part of the European Union and are subject to the same laws. However, they also benefit from specific measures and derogations from EU law. They stand out from other European regions based on remoteness from the European continent, insularity and isolation that keeps them from enjoying the EU market's full benefits, a tight the local market, economic dependency on a very small range of products, hard topographic and sometimes harsh climate conditions. These characteristics severely hamper economic, social and territorial development. In addition, these specific conditions mean that tourism is usually one of the dominant economic sectors in those regions. Most of the EU outermost regions are islands and all of them heavily depend on air transport as the dominant way to get to the regions, in addition to boats, ferries and cruise ships. Unique ecosystems with outstanding biodiversity make these regions specifically attractive but also sensitive to mass flows of visitors and tourists.

Madeira – a prominent example for a 'Sea meets Sky' region

The Autonomous Region of Madeira (ARM) represents EU outermost regions tourism. Madeira and Porto Santo are part of a group of Portuguese islands in the Atlantic, 90 minutes from Lisbon (by plane). Madeira and Porto Santo are the two main islands, and the only ones inhabited. The Desertas and Selvagens Islands are nature reserves and refuges for multiple species of birds, plants and sea lions, and can be visited with prior authorisation. Madeira has a multifaceted culture and mild climate all year long, but with microclimates throughout the archipelago. The islands have a long history from trans-Atlantic trade, sugar cane, its famous wine and, more recently, natural and active tourism. There are several cultural celebrations, such as the famous flower festival and the wine festival. The Madeira Islands are among the most famous island destinations in Europe, due to the climate, natural and cultural values and unique attractions.

Madeira received around 1.5 million visitors in 2019, an average of 5.8 visitors per inhabitant, much higher than the Portuguese average of 2.6 visitors per inhabitant. Usually, visitors arrive by air or cruise ship. In 2019, 3 million passengers passed through Madeira airport and the smaller Porto Santo airport handled 165,000. According to the ARM Ports Administration, in 2019, 298 ships docked at ARM ports with about 590,000 passengers on cruise ships, 1.7% more than in 2018. The busiest month was December with 93,000 passengers and the least busy was June, with only 1,737 visitors. Most cruise ship visitors arrive in the winter season, between October and April. In 2019, the overwhelming majority of transit passengers at the Port of Funchal were Europeans (89.2%), in particular from Germany (40.5%) and the United Kingdom (32.5%) (Direção Regional de Estatística da Madeira, 2020).

In 2019, the number of overnight stays in ARM tourist accommodation was almost 8.5 million. Residents in Portugal contributed with about 1.1 million overnight stays (13%), while non-resident foreigners made up the rest. The main sources of visitors were Germany, the United Kingdom, France, the Netherlands, Poland, Denmark and Sweden, which accounted for 78.1% of nights spent by non-resident foreigners. Hotels, apartments and guest houses recorded more than 6.7 million overnight stays in 2019, contributing 83.0% of the tourist accommodation. Most overnight stays were in July and August, though this was fairly balanced over the year, with more than 500,000 overnight stays each month. Thus, seasonality is low, due to a constantly mild climate all year long. Golf is a prominent holiday activity, with 65,387 rounds played on the three golf courses in 2019, generating about EUR 2.6 million in revenues. 73% of these rounds were played by non-members, mostly from the Nordic Countries, Portugal and Germany. 58% of the rounds were sold by hotels and the like, 22% by tour operators and the remaining 20% by the golf courses themselves. Hiking and maritime activities such as whale watching are also prominent attractions for tourists. (Direção Regional de Estatística da Madeira, 2020).

The region's economy is essentially based on the tertiary sector, which represents 77% of total employment. Tourism is the main driver and main source of revenue for the regional economy. The sector generates approximately 30% of regional added value and 15% of regional employment. Accommodation and Restaurants (14%) and Car Trade and Repairs (13%) are among the most important branches. About 75% of the archipelago's population is concentrated on the south coast, in particular in Funchal, the region's capital. This is where most economic activity is carried out and where most hotels are located (Região Autónoma da Madeira, 2016).

COVID-19 had a strong negative effect on tourism in Madeira. There was practically no tourism between April and June 2020. Occupancy rates in Madeira tourism accommodation recovered to some 30% between August and October 2020, while dropping again to 15-20% in November 2020. In February 2021, there were an estimated 57,000 overnight stays in tourist accommodation, a decrease of 90% compared to the same month last year, higher than the average decrease observed for Portugal, which was 87.7%. The decrease was mostly due to the UK, Nordic European Countries and non-European markets which dropped by more than 90%. The number of Portuguese hotel guests declined only by 56% in January 2021 compared to the same month in 2020. ARM was the first region in Portugal to have a Contingency Plan for Emerging Infections, to develop a best practices document and create an online platform for registering travellers (madeirasafe.com). ARM is committed to positioning itself as a safe destination and is working together with SGS, a certification service provider, to ensure best practices throughout the archipelago, to minimise the risk of COVID-19 resurgence. The certification process is available to all companies in the tourism sector, being easily identifiable by the logo MADEIRA SAFE TO DISCOVER. Visitors are monitored through the Madeira Safe To Discover app, from the Regional Health Authority which is voluntary but recommended. Most local companies are also adopting the CLEAN & SAFE stamp, created by VisitPortugal.

2.6.6 Tourism region type 'Cosmopolitan'

European city tourism regions base their attraction mainly on a combination of travel motivations and activities such as shopping, cultural events, attractions such as heritage, museums and landmarks, but also business travel and MICE tourism. Major metropolitan areas like Paris, London, Rome, Berlin, Barcelona, Vienna and Madrid have a high share of EU, international and domestic tourists. These destinations have a wide range of attractions and other economic sectors, so tourism is not the main sector, even if tourism employment and added value is very high in comparison to other regions. Usually, tourism in larger metropolitan areas is not seasonal, since visitors are attracted more or less all year round. For larger cities, there is less sensation of overtourism, even if some attractions receive the most attention and are always fully booked. Medium-sized cities benefit from being close to other highly attractive regions, or can be a main driver for tourism, even if beaches or mountains are nearby. An example is Tuscany with a high share of tourists visiting Florence, Siena and Pisa. Medium-sized cities increasingly receive a significant number of day-tourists (for example, from cruise ships) that in recent years add to a feeling of crowdedness or overtourism, examples are Barcelona, Venice, Naples, Dubrovnik and Amsterdam. Especially in these cities, inner city areas seem increasingly dominated by tourism businesses and accommodation, leading to increasing exclusion of residents. Examples are Bruges and Palma de Mallorca. Other cities have also seen significant growth, but visitor figures are low in comparison to the local population, as in Bilbao, Glasgow, Hamburg, Cork and Athens.

Paris – a prominent example for a 'Cosmopolitan' region

The region of Ile-de-France with its centre of Paris is an example of a European city tourism region combining attractions and products such as shopping, cultural events, heritage, museums, landmarks, business meetings, conventions and exhibitions. Ile-de-France also benefits from the Disneyland Paris theme park and heritage sites like Versailles Palace.

Paris Ile-de-France was the top destination worldwide, with 50 million tourists in 2019. According to estimates, visitors spent nearly EUR 22 billion, roughly the same as in 2018. Arrivals are mainly by plane and train. In 2019, Paris airports welcomed 73.3 million passengers. Hotels are by far the predominant form of accommodation, with 35.4 million arrivals in 2019. However, furnished rental accommodation (e.g. AirBnB) saw a 7.6% increase in the number of nights booked. 53% of tourists and visitors to Ile-de-France are French, while 47% come from other countries, in particular the USA, the UK, Germany, Spain, China, Belgium, Italy, the Netherlands, Japan and the Middle East. Tourist flows are strong all through the year with significant peaks in April, June and September with less arrivals in December, January and August. Of a total 70.7 million overnight stays in 2019, 34.1 million, or 48% were for business. Business tourism inflows are constant throughout the year. Other motives to travel to Pairs are the cultural attractions. Among the most important places to visit are the Louvre museum, the Eiffel tower, Centre Pompidou and the Arc de Triomphe. Eating out and shopping are of course also important (Paris Región, 2020).

Tourism generates 395,000 jobs in Ile-de-France, 261,500 of which are in sectors directly linked to tourism in the region and 60% of these jobs are in Paris. The restaurant sector generates more than a third of tourism jobs (35%), followed by hotel and accommodation (25%). In Paris there is a relatively high concentration of jobs in the 'heritage and cultural services sector' comparable to the number of jobs in local transport/taxis and organisation of business meetings, fairs and conventions. In Seine-et-Marne, more than 50% of the tourism jobs are in the sports and leisure sector thanks to Disneyland Paris, far ahead of the restaurant business (17%) and accommodation (12%). Ile-de-France sees EUR 39 billion in tourist revenue, which is more than a quarter of all tourism revenue in France. The value added of tourism comes in particular from air transport (23%), hotels (14%), refreshment/food (14%), as well as travel agencies and tourist operators (13%) and train transport (7%) (Insee, 2015).

The COVID-19 pandemic hit tourism in the Ile-de-France Region very hard. Paris Region recorded 14.3 million fewer tourists in the first half of 2020. Paris Airport welcomed only 25.4 million between January and August 2020 against 73.3 million passengers in the same period in 2019. The decline was particularly marked for international visitors with 68% less stays compared to 54% less for French visitors. Over the first half of 2020, overnight stays in hotels were down 61% compared to the first half of 2019 (Paris Région, 2021). Attendance at museums and monuments also fell significantly in the first half of the year, with declines of 60 to 80%. There was a gradual recovery of activity in summer 2020 from domestic and EU visitors. However, tourists during the summer period were 50 to 60% less than 'normal' periods. After a slight improvement in September, tourist activity in the region fell back following a curfew from 17 October (Paris Région, 2021). Already in March 2020, the Region set up the COVID-19 system with economic measures which supported the tourism sector. In addition, millions of masks were distributed to restaurants, cafés, taxis, shopkeepers and major sites and monuments. 1,000 Tourism Volunteers were deployed to welcome tourists. A recovery plan was adopted at the beginning of July 2020 (NECSTouR, 2020a).

3 COVID-19 impacts on tourism regions

The tourism sector is among those most heavily impacted by the COVID-19 pandemic and impacts are expected to exceed those from previous global shocks. After SARS it took tourism 5 months to return to growth, after September 11, it took 6 months and after the Global Economic Crisis, 10 months (Drakopoulos, 2020, p. 5).

To understand the impacts of the pandemic on tourism regions, it is important to depict the multiple ways COVID-19 and related policy measures affect different segments or players in tourism ecosystems (see section 3.1). Then the regional diversity of impacts can be discussed in multiple ways. While the pandemic was devastating for most tourism areas (see section 3.2.2) others could benefit from (see section 3.2.3). Based on this we propose a regional typology of COVID-19 impacts on tourism (see section 3.2.4). Finally, we take a first outlook at the months to come (see 3.3).

3.1 Multiple ways that COVID-19 impacts tourism ecosystems

To understand the regional dimension of impacts, it is important to distinguish between the dimensions or phases of the pandemic which have different geographical patterns (see Figure 3.1):

- The pandemic has a territorial dimension, with variations of infection hotspots and deaths. The territorial variations and patterns are visible from regional maps on the JRC COVID-19 monitoring platform[5]. This has led to policy interventions improving the readiness of the healthcare system and large-scale policy responses in terms of lockdowns.

- The lockdowns and their degree of social and economic standstills show clear territorial variations. Although most policy responses have been national, restrictive measures result in very different regional situations. Consequently, some regions face more intense and/or longer-lasting consequences than others (e.g. SWD(2020) 98 final, 20ge20). The socio-economic asymmetry of consequences across Europe, countries and regions is largely shaped by regional socio-economic diversity (OECD, 2020d). Variations in the impacts of policy responses show the territorial impacts of COVID-19 (Böhme, Besana, et al., 2020).

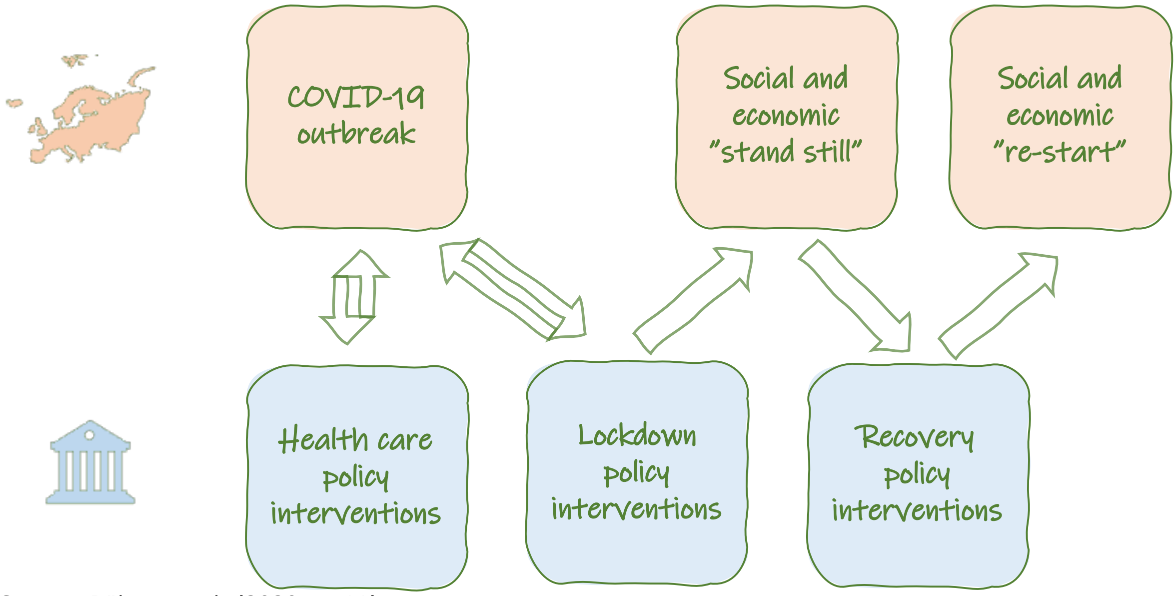
- The impacts of lockdowns have led to a wide range of recovery policies, at European, national, regional and even local level. These policies have different territorial impacts.

Tourism contributes to about 10% of EU-27 GDP and employment (Joint Research Centre, 2020, p. 1). Accordingly, a decline in tourism has notable effects on local and regional development in Europe.

The COVID-19 pandemic has put a sudden stop to the growth of the tourism sector and led to declines. In the literature it is often pointed out that tourism is possibly the sector most affected by the COVID-19 pandemic. This is partly also due tourism industries, such as accommodation and long distance air passenger transport, having limited alternatives to their activities during lockdowns (Joint Research Centre, 2020, p. 1).

[5] See https://covid-statistics.jrc.ec.europa.eu/

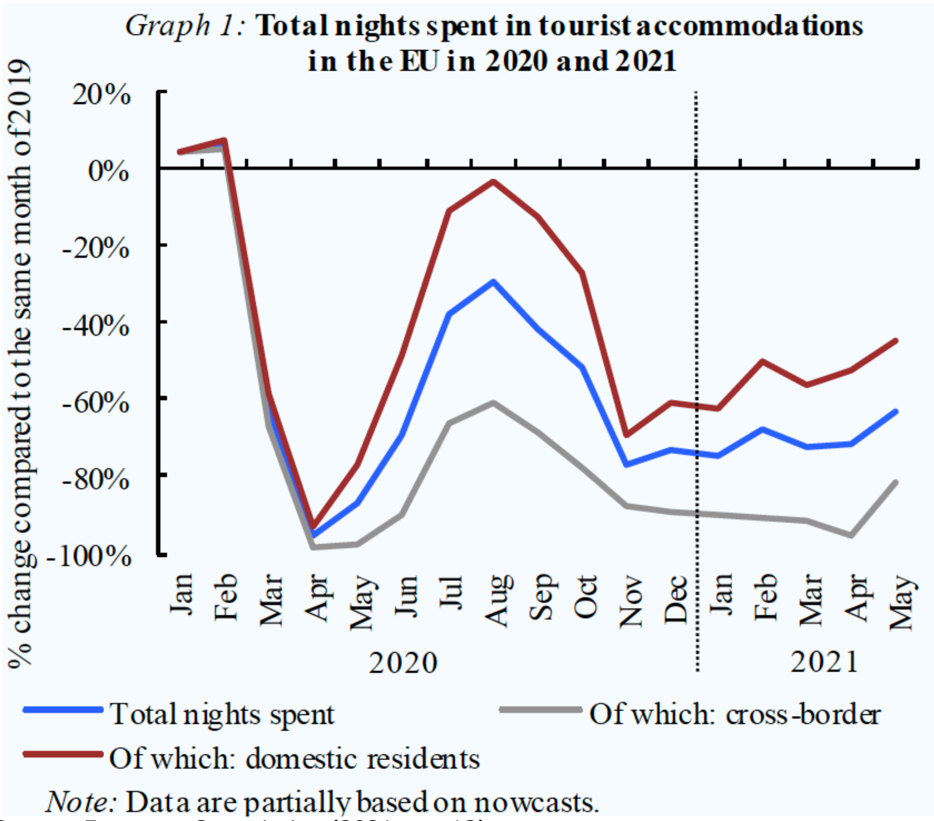
Figure 3.1 COVID-19 geographies and policy responses



Source: Böhme et al. (2020, p. 11)

There are still no consolidated figures about the decline at global level. However, various informed estimates vary between declines of 50 and 80% depending on the source and when the estimates were made. In July 2020, the European Travel Commission estimated a decline of over 50% in 2020 (European Travel Commission, 2020b, p. 7). The total nights spent in tourist accommodation in the EU 2020 were 50% of the 2019 level, with domestic tourists at 67% and international at 30%, see also Figure 3.2 (European Commission, 2021a). In October 2020, the OECD estimated a decline in international tourism of some 80% (OECD, 2020b, pp. 2–3).

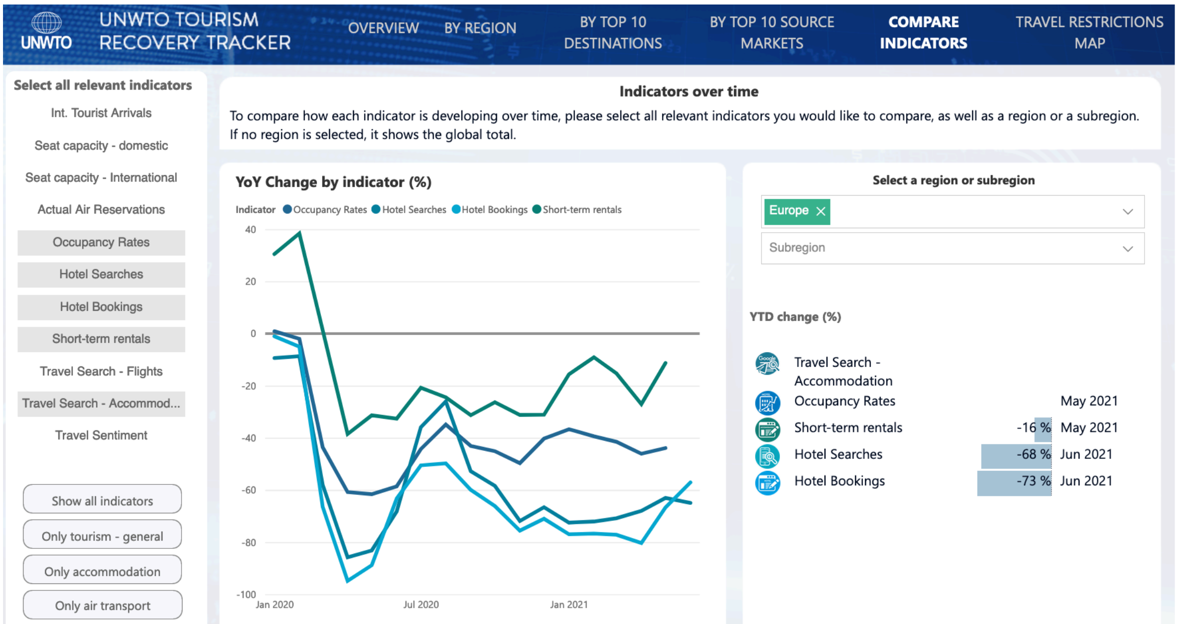
Figure 3.2 Change of nights spent in tourist accommodation 2020-2021



Source: European Commission (2021a, p. 13)

The decline in tourism is not just driven by restrictions put in place by various levels of governments (local to national), but also by changes in tourist behaviour. This can be seen in the decline of international flight bookings, hotel occupancies, hotel prices, etc. One picture of how these aspects changed in 2020 and 2021 compared to pre-COVID-19 times is shown in Figure 3.3. According to the UNWTO Tourism Recovery Tracker, in Europe, hotel searches where down by 68% in May 2021 compared to 2019 and hotel bookings by 73%. Other sources point to a reduction of bookings in the EU of 60% to 90% compared to previous years (European Commission, 2020, p. 9).

Figure 3.3 Accommodation searches and bookings 2020-21



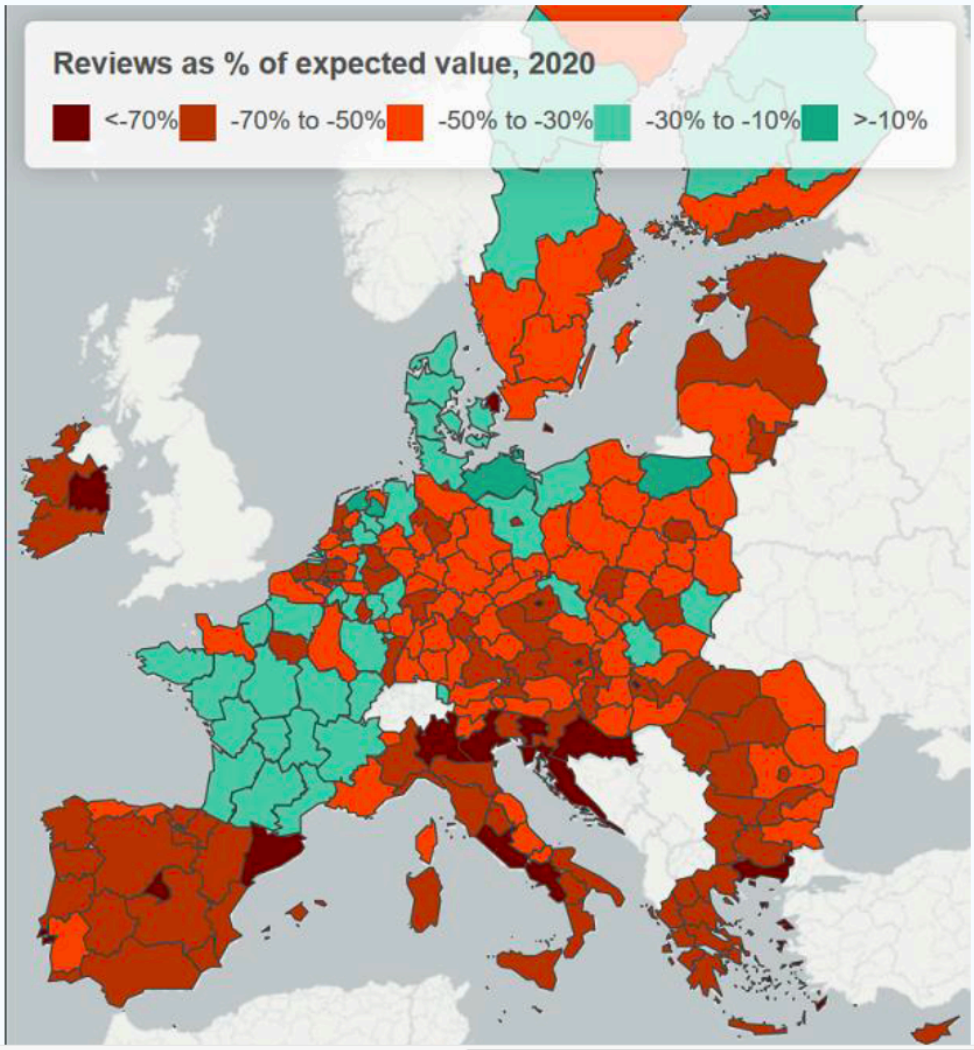
Source: https://www.unwto.org/unwto-tourism-recovery-tracker as of 09 July 2021

The decline is expected to vary between regions, mainly depending on the type of destination. The European Travel Commission points out that the decline will be particularly severe for destinations that rely on air connectivity and short breaks (European Travel Commission, 2020b, p. 25). Indeed, destinations largely relying on air travel were most hit, e.g. tourism in Cyprus was 22% , whereas tourist nights in the Netherlands was 70% of 2019 levels (European Commission, 2021a).

Urban and coastal tourism in the Mediterranean saw the largest declines. Urban tourism went down by about 30% on average, with considerable variations between urban areas (e.g. -80% in Dublin and -55% in Hamburg), and remained low in the first half of 2021. Many Mediterranean destinations saw coastal tourism decline strongly not least due to a dependence on air travel (see Map 3.1).

On the other hand, many coastal regions with strong domestic markets and rural tourism regions were less severely affected. Regions in Denmark, Germany, France, the Netherlands and Poland saw activity in the third quarter close to, or even exceeding, expected levels and some rural tourism was comparable to that in coastal regions, most notably in France. However, other rural areas saw a stronger deterioration, which may be related to less sightseeing and business travel. (European Commission, 2021b, p. 8)

Map 3.1 Regional tourism, January-December 2020



Source: European Commission (2021b, p. 9)

There are also various assumptions for how long it will take to recover to previous levels of activity. European assumptions are that 2019 levels will not be achieved until 2023 (European Travel Commission, 2020b, p. 7) or even 2024/25 (EUROCONTROL, 2021) and the UN World Tourism Organization (UNWTO) expects up to four years (OECD, 2020b, pp. 2–3). The recovery will also differ between different types of tourism, in particular extra-EU travel is expected to take more time to recover than intra-EU travel (European Commission, 2021b).

As tourism declines, so does income for tourism enterprises. In summer 2020 it was estimated that revenue losses in Europe reached 50% for hotels and restaurants, 85% for tour operators and travel agencies, 85% for long-distance rail and 90% for cruises and airlines (European Commission, 2020, p. 9).

This leads to liquidity issues as well as job losses in the tourism sector. SMEs are particularly challenged, but also large firms suffer including Flybe and Hertz (WTTC, 2020, p. 5). Lacking liquidity and facing uncertainty, they struggle to access funding and maintain their employees (European Commission, 2020, p. 9), putting various tourism jobs at risk. Estimates are for between 6 million (European Commission, 2020, p. 10) and 14-29 million jobs (European Travel Commission, 2020a, p. 6) in Europe at risk depending on the length of the pandemic. Given the employment profile in the tourism sector this may particularly affect more vulnerable groups especially seasonal, temporary and low-skilled workers, who are often women, migrants and young people. Furthermore, these jobs are often concentrated in regions with limited alternative sources of employment, with tourism accounting for 10% to 50% of jobs in many, including island, remote and outermost regions (European Commission, 2020, p. 10).

The expected impact varies between places and a few examples showcase this:

- For Belgium revenue losses in the tourism value chain are estimated at more than EUR 2 billion per month with lockdowns (EUR 1.3 billion in Flanders, EUR 400 million in Brussels and EUR 326.1 million in Wallonia) (OECD, 2020b, p. 40). EU travel and tourism saw 60% to 90% fewer bookings compared to previous years. According to industry estimates, revenue losses at European level have reached 50% for hotels and restaurants, 85% for tour operators and travel agencies, 85% for long-distance rail and 90% for cruises and airlines. Tourism enterprises face an acute liquidity crisis. The crisis has hit SMEs the hardest as they lack liquidity, face uncertainty and are struggling to stay afloat and maintain their talent. (European Commission, 2020, p. 9)

- Germany reports a decline in tourist arrivals of 42% and overnight stays of 31% for the summer season 2020 (May-October) compared to 2019. The number of overnight stays fell especially for foreign visitors (-68%), while domestic nights fell by 23%. However, the loss of visitors mostly affected hotels and B&Bs (-40% compared to 2019), while overnight stays at holiday houses and apartments increased by 1% and nights spent at camping sites rose by 6%. For regions, the decline was greatest in Berlin (-68%) and less severe in Mecklenburg-Vorpommern (-4.6%) (Destatis, 2021).

- For Spain, the effects are severe. In 2020, 18.9 million foreigners visited Spain, a decline of 77%, compared to the 83.5 million who visited in 2019. Visitor figures were back to the level of 1969. Of these, 15.5 million travelled for leisure, 78.7% less. Arrivals for business or professional reasons, were 1.4 million, 74.9% less. Parallel to this decline in visitors is the drop in tourist income which fell to EUR 19,740 million, 78.5% below 2019. Catalonia was the top destination for tourists in 2020, with 3.9 million visitors, accounting for 20.4% of the total. The second region was Canary Islands, with 3.8 million tourists, Andalusia (2.7 million), the Valencian Community (2.5 million), the Balearic Islands (1.72 million) and Madrid (1.7 million) (INE, 2021).

- In France, lockdowns affected approximately 75,000 restaurants, 40,000 cafes and 3,000 nightclubs, which employ more than a million people (OECD, 2020b, p. 48). Looking more specifically at tourism, Ile-de-France recorded 14.3 million fewer tourists in the first half of 2020 compared to the same period in 2019 and a loss of EUR 6.4 billion (NECSTouR, 2020a, p. 13).

These first reflections on the decline show a diversity between different tourism ecosystems and subsequently between different places where particular segments shape the local and regional economy. Further insights on variations between segments – and thus places – to be further explored in this study include (see also Table 3.1):

- **Hotels:** These had extremely low occupancy rates in 2020 and early 2021, and major hotel chains saw their stock price plunge. In Europe it was estimated that 76% of hotels closed at least temporarily (OECD, 2020e, p. 14).

- **Sharing economy accommodation:** The pandemic put accommodation platforms under pressure as bookings declined and some people even took their apartments or rooms off the platforms and moved to long-term rental. In consequence, Airbnb cut 25% of its workforce in May 2020 (OECD, 2020e, p. 14). Dolnicar & Zare expect that the Airbnb market will recover, although not all hosts will return to the short-term market and many may factor in the risk of economic shocks into their calculations (Dolnicar & Zare, 2020, p. 2).

- **Food and catering:** If not forced to shut down entirely or limit their services to takeaway and home-delivery, requirements for increased social spacing in eating establishments restrict food and catering services. Even as restrictions are being lifted, food-related activities are still limited. (OECD, 2020e, p. 14)

- **Events and business travel:** Most companies have cancelled or suspended business travel due to the coronavirus. Events of all sizes have been affected, most prominently a delay to the 2020 Olympic Games. The financial impact is massive. Estimates from spring 2020 point to more than 500 trade shows cancelled globally, with an estimated cost of up to EUR 23 billion in lost orders for exhibitors. On 20 March, the Global Association of the Exhibition Industry (UFI) estimated that contracts worth at least EUR 134 billion would not be concluded if events did not take place as planned through Q2 2020 (OECD, 2020e, p. 14). Well, they did not.

- **Culture and events.** Museums and cultural event organisers had huge financial losses as facilities shut down and events were cancelled. Estimates by the International Council of Museums (ICOM) in April 2020 already pointed at losses in the cultural sector of EUR 3 billion in Italy and EUR 980 million in Spain (OECD, 2020e, p. 14). Most likely, these figures will have been exceeded as the pandemic continued into winter 2020/21.

- **Airports:** Airports Council International estimated, as of 5 May 2020, that the crisis would result in 4.6 billion fewer passengers in 2020. This will have knock-on effects for airports, which could face a global loss of USD 97 billion. IATA expects recovery in air travel to lag economic recovery, with no uptick before 2021. (Drakopoulos, 2020; OECD, 2020e)

- **Cruises:** Cruise lines faced the double challenge of ensuring visitor and worker safety, as some cruises could not disembark and repatriate clients, compounded by losses in bookings and revenues. Following an extended period where cruise ships remained at sea while seeking to secure permission to berth and disembark passengers, as of 6 April 2020, CLIA reported that only seven of its members' cruise ships were on their way to port. (Drakopoulos, 2020; OECD, 2020e)

- **Tour Operators:** Tour Operators have reduced or halted operations until further notice as the pace at which the situation evolved increased organisational complexity across administrative boundaries. Having suspended all activities from mid-March until mid-May at the earliest, TUI Group announced on 13 May 2020, it was ready to resume activities and indicated that forward-bookings for summer 2021 were performing strongly. (Drakopoulos, 2020; OECD, 2020e)

Table 3.1 Impacts and future expectations in selected tourism segments

Transport	Air Transport: IATA has downgraded its air travel forecast for 2020 and now expects air travel to be down 66% in 2020.[16] ICAO estimated for 2020 an overall reduction ranging from 50% to 52% of seats offered by airlines, and reduction of almost 3 billion passengers, resulting in USD 3862 to 399 billion potential loss of gross passenger operating revenues of airlines.[17]
	Cruise: From mid-March, when the suspension of cruise operations began, through the end of September, the worldwide impact will be a loss of USD 50 billion in economic activity, 334 000 jobs and USD 15 billion USD in wages.[18]
	Railway: The International Union of Railways (UIC) estimates that passenger and freight revenues could lose up to USD 125 billion total for both 2020 and 2021. Looking at the revenues, the estimate shows more than USD 36 billion of losses in the first semester 2020.[19] Car rental: Hertz, one of the biggest international car rental, had its global revenue declined 67% in the second quarter of 2020.[20] Coach transport: Charter up, a transport service provider, data from an industry survey shows that from April to July 2020, on average sales dropped 95% and 80% of employees have been furloughed or terminated in the United States.[21]
Tour Operators and Travel agencies	According to a global survey on tour operators, respondents are predicting a 73% decrease in business volume in the third quarter of 2020, and 60% declines in the fourth quarter of this year.[22] TUI group, one the largest Tour operators, reported for the second quarter of 2020 for the Group revenue of EUR 75 million, down 98%, reflecting business standstill for most of the quarter with partial operations successfully resumed from mid-May.[23] Similarly Booking Holdings, a large online tourism agency (OTA), reported an 87% year on year decrease in room nights booked in the 2nd quarter of 2020.[24]
Hotels and shared accommodation	Between January and the end of June 2020 hotel revenues per available room (RevPAR) was 64.8% lower than the previous year (27 global markets included in the analysis). While, short-term rental (e.g. AirBnB) RevPAR, was down 4.5% year over year. Hotels bottomed out at 17.5% occupancy for the week ending 28 March, while short-term rentals fell to a low of 34.3%. Hotels were hit harder due to greater reliance on group demand and business travel.[25] Marriott international, a hotel group with more than 7000 properties global, in the second quarter of 2020 reported net loss of USD 234 million, compared to reported net income of USD 232 million in the year-ago quarter.
Business, meetings, event travel	The Global Association of the Exhibition Industry estimated, on the 20 July, that Global exhibition business might contract by 60% compared to 2019, with a loss of USD 180 billion of total output and 1.9 million jobs affected in exhibition and tourism-related activities.[26]
Culture, sport, entertainment	During the global lockdown, 90% of countries had closed their World Heritage properties. The medium- and long-term implications are significant as many natural and cultural World Heritage sites rely on tourism revenue to carry out conservation or archaeological work.[27]
Travel technology	Amadeus group, a travel technology company, revenues contracted by Group revenue contracted by 54.7% in the first half of 2020, driven by the COVID-19 impact on the travel industry.[28]

Source: OECD (2020b)

3.2 Regional diversity of impacts

Although all (tourism) regions are heavily impacted by COVID-19 there are considerable variations between them. These are mainly explained by lockdown measures affecting these regions and by their economic structure related to tourism.

To better understand the regional variations of COVID-19 impacts on tourism, the exposure and economic sensitivity to lockdowns needs to be analysed. This can follow the conceptual approach of Territorial Impact Assessments (see textbox).

Territorial Impact Assessment

For each geographical dimension of the COVID-19 pandemic, differentiating between exposure and sensitivity helps understand what these mean for different types of territories. Following the approach of a Territorial Impact Assessment (Böhme & Besana, 2020; ESPON, 2013; Essig & Kaucic, 2017; Gaugitsch et al., 2020) the methodology provides a rough snapshot of the exposure and sensitivity of European regions to COVID-19 policy responses. Exposure and sensitivity are understood as follows (Böhme, Lüer, et al., 2020):

- Exposure: How much a region will be affected by a policy (positively or negatively)?
- Sensitivity: How much regional development will be affected due to specific regional characteristics and endowments?

3.2.1 Exposure

Territorial exposure to COVID-19 policy responses affecting the tourism sector varies mainly with the severity and length of lockdowns and travel restrictions, both international and national. In other words, the exposure describes how much tourism in an area is and/or was subject to restrictions affecting tourism. Although in many countries there are considerable regional – sometimes even local variations of these restrictions – comparable European-wide data is only available at national level.

The Blavatnik School of Government at Oxford University started monitoring lockdown conditions in several countries across the world: Government Response Tracker (Blavatnik School of Government, 2020). This gives comparable information on the length and character of lockdowns in all EU Member States. The 'stringency index' depicts the general situation and differences between Member States. Specifically relevant for tourism are sub-indicators on international and intra-country travel restrictions.

- **Stringency of restrictive measures in the EU.** The 'stringency index' captures how much lockdowns restrict people's behaviour as well as economic production and consumption. It tracks how government responses have varied daily, becoming stronger or weaker over the course of the outbreak. The index covers: a) closing schools and universities; b) closing workplaces; c) cancelling public events; d) restrictions on private gatherings; e) closing public transport services; f) stay at home requirements; g) restrictions on internal movement; h) restrictions on international travel; i) public information campaigns (Blavatnik School of Government, 2020). Each indicator has its own scale that assigns points based on universal thresholds. The scales for each indicator are then harmonised and combined into a final composite index. The dataset enables insights into the evolution of restrictive measures across countries. The observation period (1 March 2020 - 15 May 2021) is divided into 15-day time frames. The average score for these fortnights reveals the stringency of travel policy in each Member State over time.

- **International travel restrictions.** Government Response Tracker (Blavatnik School of Government, 2020) also tracks international travel restrictions. The indicator assigns a daily value depending on each country's policy on international arrivals with 0: No measures; 1: Screening; 2: Quarantine arrivals from high-risk regions; 3: Ban on arrivals from some regions; 4: Ban on all regions or total border closure. The observation period (1 March 2020 - 15 May 2021) is divided into 15-day time frames. The average score for these fortnights reveals the stringency of international travel policy in each Member State.

- **Intra-country movement restrictions.** The Government Response Tracker (Blavatnik School of Government, 2020) tracks internal or intra-country movement restrictions. The indicator assigns a daily value depending on each country's policy on movement within national borders: 0: No measures; 1: Recommendation to avoid travelling between regions/cities; 2: Internal movement restrictions in place. This indicator is particularly relevant to assess national and local tourism possibilities. The observation period (1 March 2020 to 15 May 2021) is divided into 15-day time frames. The average score for these fortnights reveals the stringency of domestic travel policy in each Member State.

- **Regional variations of infections.** Intra-county movement restrictions were often policy responses to variations of infection levels within a country. To better display such domestic variations, there is a fourth sensitivity indicator. Data from the European Centre for Disease Prevention and Control (ECDC) is used to establish regional variations of infection levels within countries. The weekly notification rate of new COVID-19 infections per 100,000 inhabitants is considered at NUTS 2 level[6] over the same observation period 1 March 2020 – 15 May 2021. This indicator reveals the evolution of infections over time and variations across European regions.

These four indicators have been brought together to better understand the territorial variations of lockdown measures in Europe (see Map 3.2). An impact assessment for the entire period 1 March 2020 – 15 May 2021 includes a synthetic measure for each indicator instead of their variation over time (time-series intervals). For each of the four indicators the average score for each country and region provides a systematic cross-national, cross-temporal measure to understand how government responses and regional infections have evolved. After calculating the average values for each indicator, the countries (and regions for the infection rates) have been divided into three categories[7]: Moderate; Medium; Severe to assess the territorial variation of each aspect. Based on this assessment, countries and regions are given a coefficient of 1 for moderate, 2 for medium and 3 for severe values of each indicator.

To derive a unified judgment on regional exposure to COVID-19 restrictive measures, travel restrictions and infection rates, the four indicators have then been combined into a composite index. Each region has a score from 1 to 3 for the stringency of restrictive measures, international travel restrictions, domestic travel restrictions and infection rates. The four scores are added, giving each region a final score from 4 to 12. Based on the distribution, three types of regions reflect comparative exposure to tourism restrictions.

In relation to the types of Cohesion Policy regions, only a few less developed regions are highly exposed, with most having medium exposure. Transition regions also show mainly medium exposure while about 25% have high exposure and 40% of more developed regions show exposure.

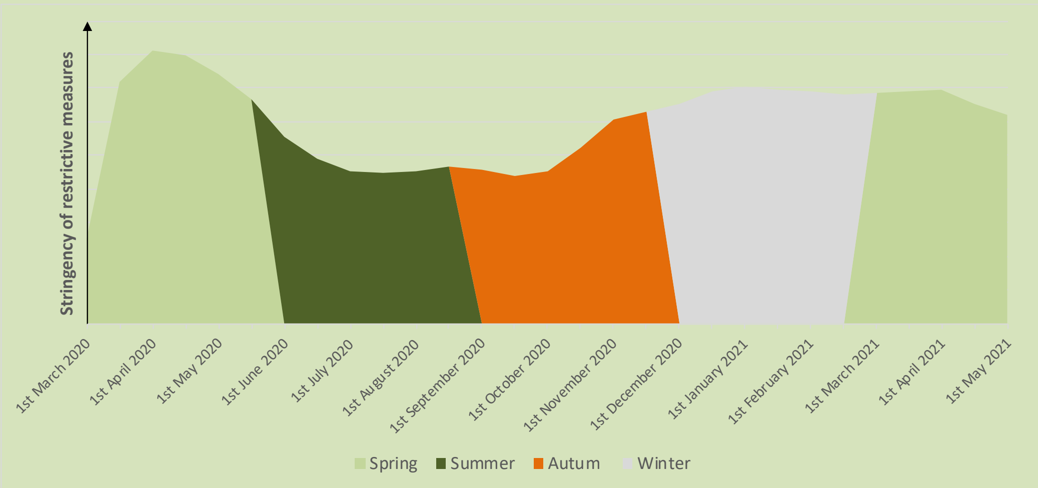
6 NUTS 2 was not available for Belgium, France and Germany, so NUTS 1 infection rates were used and assigned to each NUTS 2. In all other cases either NUTS 2 was available, or NUTS 3 infection rates have been recomputed at NUTS 2 level.

7 The medium category covers the interval between the average score and +/- half the standard deviation: $\bar{X} - \frac{\mathrm{ST.DEV}}{2}\ \bar{X} + \frac{\mathrm{ST.DEV}}{2}$. Moderate and Severe categories cover the intervals below and above Medium.

Seasonal variations in exposure

The exposure to restrictive measures was not constant between March 2020 and May 2021. The variation in the European average of the index shows that the stringency of restrictive measures varied across tourist seasons.

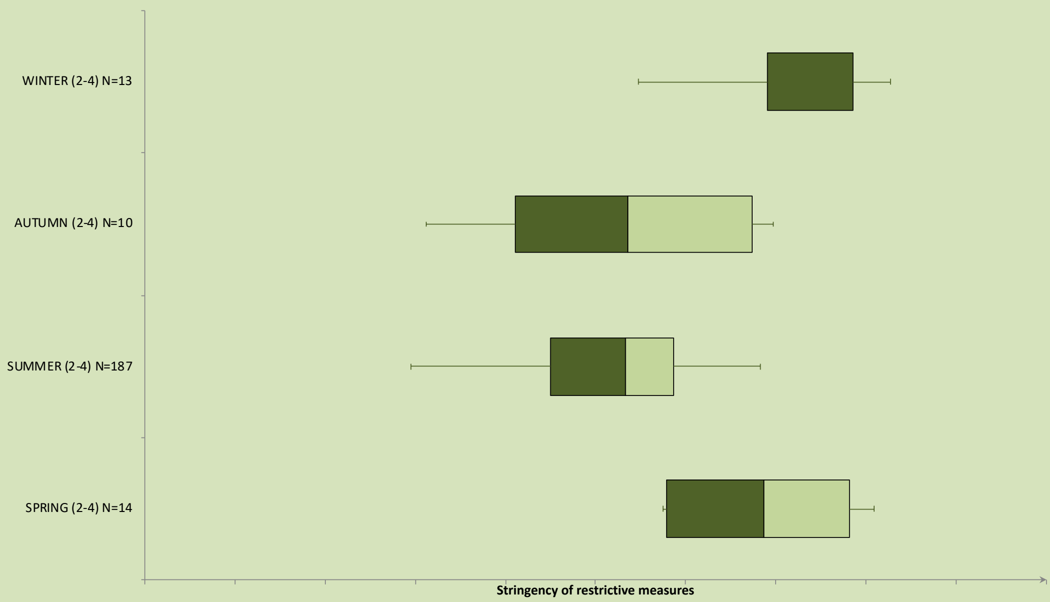
Figure 3.4 Stringency of restrictive measures over time



Source: own elaboration based on Blavatnik School of Government

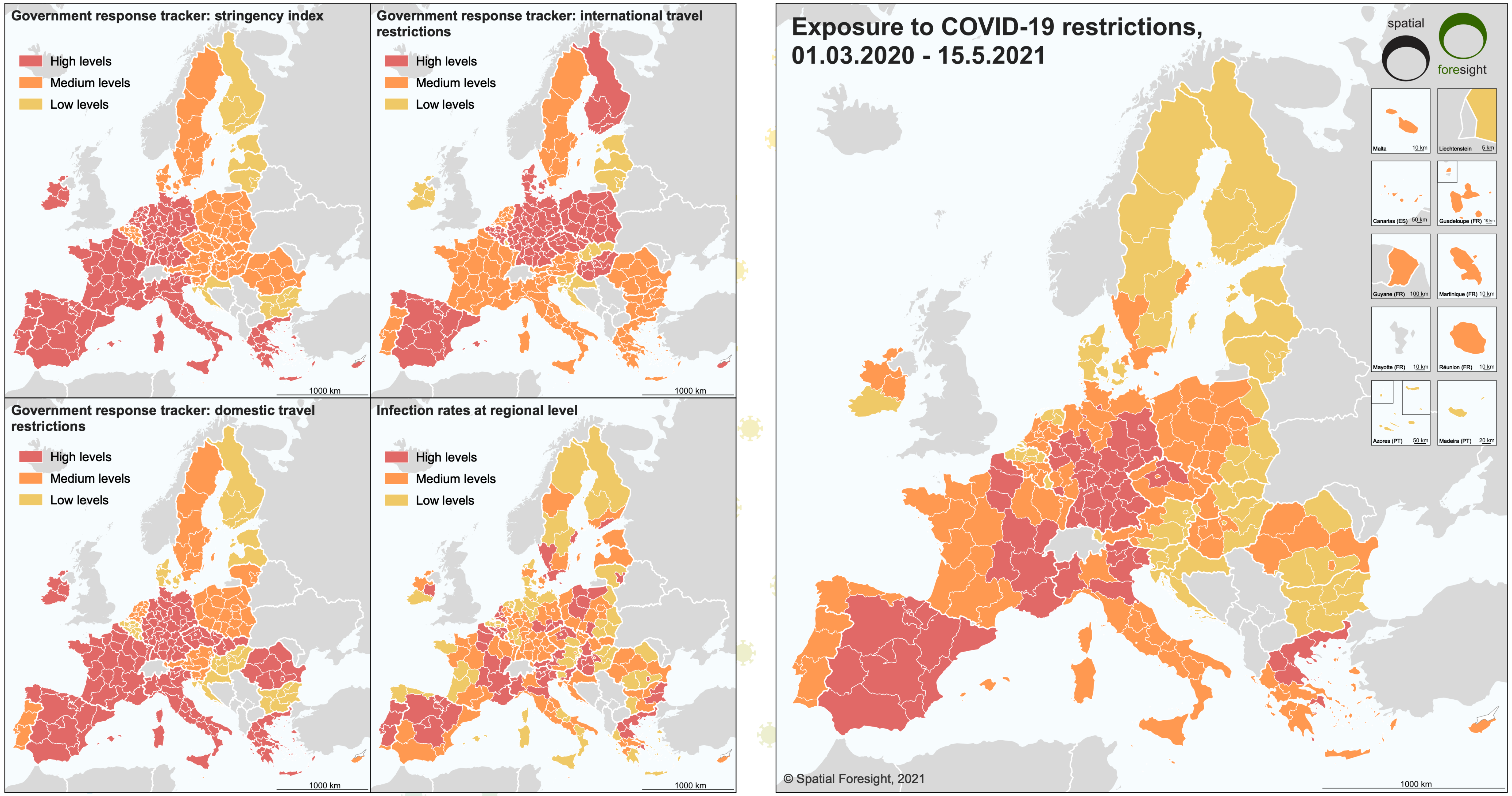
As shown in section 2.2.1 some regions are more dependent on particular tourist seasons than others. Some regions with the highest concentration of winter tourism experienced more stringent lockdowns during their main tourist seasons than others. This is followed by regions with the highest concentration of tourism in spring (see Figure 3.5). However, only a very few regions have a high concentration of tourism in the winter or spring (see N in the figure). More than 80% of regions with high concentration of tourism in one season are summer destinations.

Figure 3.5 Stringency of restrictive measures in regions with high tourism seasonality



Source: own elaboration based

Map 3.2 Exposure to COVID-19 restrictions



Administrative boundaries: Eurostat GISCO, NUTS 2 (2016)

Exposure of regional tourism sectors

- High exposure to COVID-19 restrictions
- Medium exposure to COVID-19 restrictions
- Low exposure to COVID-19 restrictions

Source: own elaboration based on following data

Exposure: Indicators from government response tracker: stringency index, imposed domestic and international travel restrictions (School of government ar Oxford University) and COVID-19 infection rates at regional level (ECDC).

Source: own elaboration

3.2.2 Potential negative sensitivities and impacts

The degree that various lockdown measures and travel restrictions affect local and regional development depends on a place's sensitivity to these measures. In territorial impact assessments, sensitivity is understood as the degree that regional development is affected due to specific regional characteristics and endowments (Böhme, Lüer, et al., 2020). The structural characteristics of regional tourism ecosystems are therefore particularly relevant to understand potential negative sensitivities to lockdowns. For this, the following aspects have been taken into consideration:

- **Contribution of tourism to regional employment.** Regions with a high share of employment in tourism are particularly sensitive to lockdowns. Accordingly, the contribution of tourist arrivals for total employment (see Map 2.6) has been taken board.

- **Contribution of tourism to national GDP.** Tourism ecosystems are widely networked within countries and same-day tourists can considerably affect the economic impacts of tourism. To accommodate this, national information on the contribution of tourism to GDP has been taken into account – applying the same level for all NUTS2 regions in the country.

- **Share of EU and non-EU tourists (reliance on non-domestic tourists).** In the pandemic tourists from other countries, within or outside the EU, failed to appear. Therefore, regions with a high share of tourists from other countries (see Map 2.5) has been included in the list of sensitivity indicators.

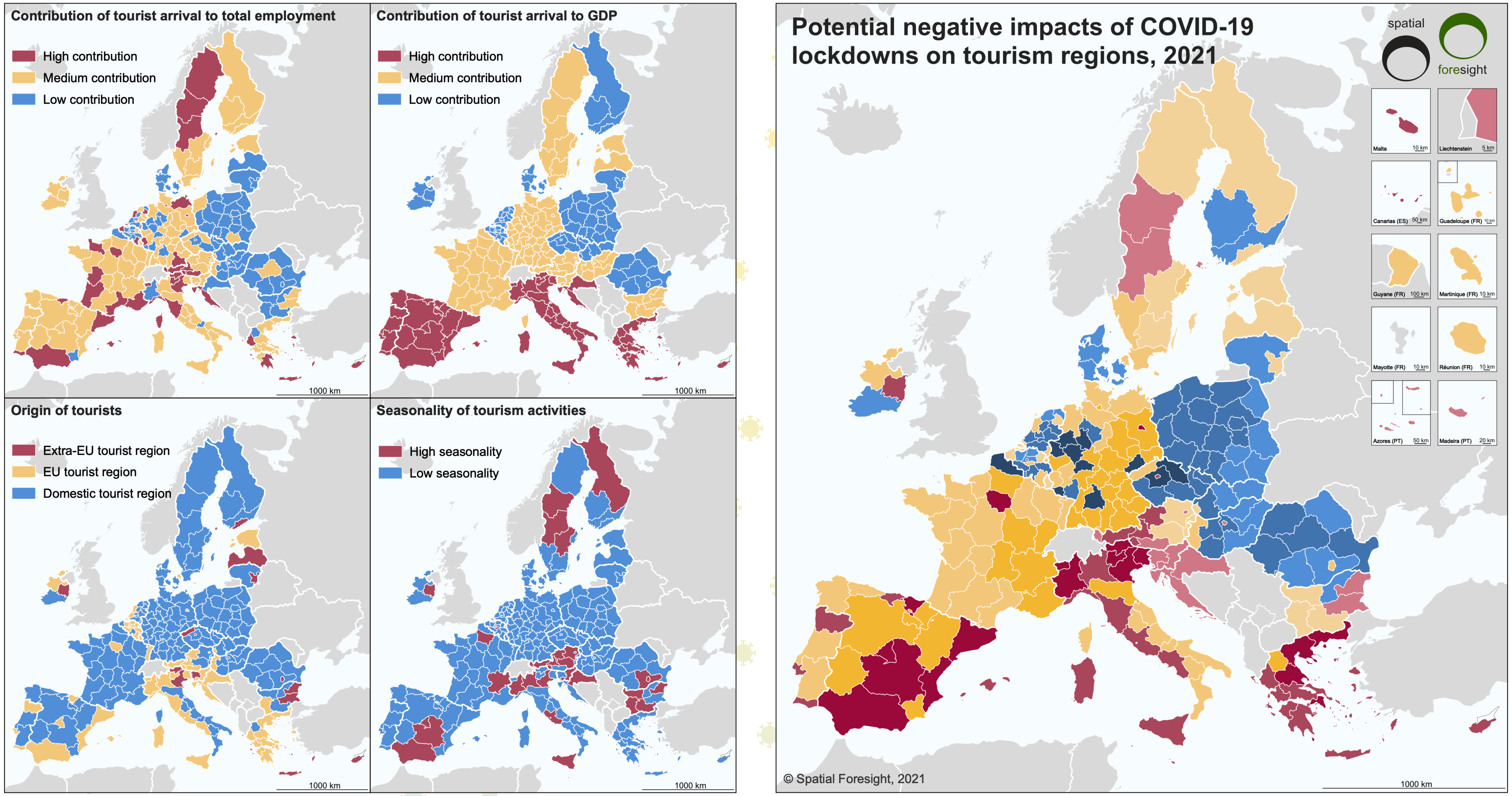
- **High seasonality with a focus on winter and spring.** Lockdowns have gone into their second year. This means all regions have been affected regardless of their seasonality. However, regions with high winter or spring seasonality are affected for a second peak season. Therefore, seasonality for high winter and spring has been taken into account in the sensitivity assessment.

The four sensitivity indicators have been brought together to better understand the territorial variations of lockdown measures in Europe. They are translated into indicators for which EU-wide data is available and brought together in a combined negative sensitivity index. This index displayed in Map 3.3 shows regions' accumulated negative sensitivity. For the first three indicators (Tourism employment, Tourism contribution to GDP, and Reliance on non-domestic tourists) regions have been assigned a coefficient of 1 for Low, 2 for Medium and 3 for High. The fourth indicator (high seasonality in winter and spring) has a binary measure of 1 for high winter or spring seasonality and 0 for all other regions. To derive a unified judgment on regional sensitivities of COVID-19 impacts on tourism, the four indicators have then been combined in a final composite index. The four scores are added, giving each region a final score from 3 to 10. The regions are then divided into three types (i.e. moderate, medium, severe).

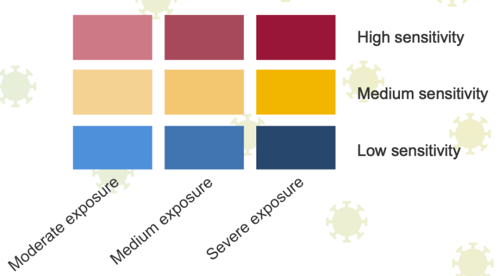
Exposure and sensitivity have been brought together in a map to see which regions are particularly exposed to lockdown measures and have a tourism industry which is particularly sensitive to these (see Map 3.3). The potentially most badly affected regions, with high sensitivity and high exposure, are a mix of major urban destinations, including the capital regions of Athens, Berlin, Madrid and Paris, and various destinations in Spain, Italy and Greece. The most affected destinations include País Vasco, Castilla-La Mancha, Cataluña, Comunidad Valenciana and Andalucía in Spain, Piemonte, Valle d'Aosta, Provincia Autonoma di Bolzano/Bozen, Provincia Autonoma di Trento, Veneto and Friuli-Venezia Giulia in Italy and Eastern Macedonia, Thrace, Central Macedonia and Thessaly in Greece. This is followed by regions with high sensitivity and medium exposure. This group includes most parts of Greece, Lisbon, Norte and Algarve in Portugal, large parts of Italy, the regions of Salzburg, Tirol and Upper Austria, Malta, Cyprus and the capital regions of Prague, Brussels and Dublin.

In other words, Southern Europe and the Alps are more affected, while large parts of Eastern and Northwest Europe are less affected as tourism plays a lesser role in the regional economies. This is also reflected in the sensitivity of different types of 2021-27 Cohesion Policy regions. While about 45% of less developed regions show low sensitivity, 45% of the more developed and 63% of transition regions show medium sensitivity. About 1/3 of both the more and less developed regions show high sensitivity while only 15% of the transition regions do.

Map 3.3 Potential negative impacts of COVID-19 on tourism regions



Administrative boundaries: Eurostat GISCO, NUTS 2 (2016)



Source: own elaboration based the following data inputs

Sensitivity: Contribution of tourist arrival to total employment (data communicated by JRC and produced in the framework of the publication from Marques Santos, A., Madrid, C., Haegeman, K. and Rainoldi, A. (2020). Behavioural changes in tourism in times of Covid-19, Publications Office of the European Union, Luxembourg, ISBN 978-92-76-20401-5, doi:10.2760/00411, JRC121262), contribution of tourist arrival to GDP (World Travel & Tourism Council (WTTC)), origin of tourists (extra-EU tourist region, EU tourist region, domestic tourist region) (Spatial Foresight, based on dataset 'tour_occ_nin2' (accessed 05 January 2021, Eurostat), observatoire des territoires, enquète de fréquentation dans l'hôtellerie (accessed 05 January 2021, INSEE) and characterisation of tourism expenditure in EU regions (JRC)) and seasonality of tourism activities (data communicated by JRC and produced in the framework of the publication from Silva, F. B., Herrera, M. A. M., Rosina, K., Barranco, R. R., Freire, S., & Schiavina, M. (2018). Analysing spatiotemporal patterns of tourism in Europe at high-resolution with conventional and big data sources. Tourism Management, 68, 101-115).

Exposure: Indicators from government response tracker: stringency index, imposed domestic and international travel restrictions (School of government ar Oxford University) and COVID-19 infection rates at regional level (ECDC).

Source: own elaboration

3.2.3 Potential positive sensitivities and impacts

Many tourists could not follow their usual holiday preferences during the pandemic. Some explored new destinations, often closer to home, with a stronger emphasis on domestic travel and rural destinations. This meant that some regions saw new tourism.

The characteristics of regional tourism ecosystems are therefore particularly relevant to understand the potential sensitivities to lockdown measures, including:

- **Population density.** Crowded places pose particular infection risks, while low population density places have a higher potential to attract visitors. This includes rural, mountain and nature destinations as shown in Map 2.1. For the sensitivity analysis this has been translated into areas with low population density.

- **Share of domestic tourists.** The pandemic boosted domestic tourism, as travelling within a country was normally less restricted than international travel and many tourists felt more comfortable staying close to home and their 'own' health care system. Therefore, areas which traditionally have a high share of domestic tourists (see Map 2.5) were probably less affected and potentially even experienced more demand.

- **NATURA 2000 areas.** Domestic tourism in areas with low population density requires some sort of attraction. As proxy, NATUR 2000 areas have been taken into account, enabling EU-wide comparable statistics on valuable natural areas.

These three sensitivity indicators have been combined to better understand the territorial variations of lockdowns. They are translated into indicators for which EU-wide data is available and brought together in a combined negative sensitivity index. This sensitivity index displayed in Map 3.4 shows the regions' accumulated sensitivity. For each indicator (Population density, Share of domestic tourists, and NATURA 2000 areas) regions have been assigned a coefficient of 1 for Low, 2 for Medium and 3 for High.

The three indicators have then been added to give a composite index with a final score from 3 to 9 for each region. Three types of regions are then defined reflecting their sensitivity to the dynamics of COVID-19 on tourism related activities. Exposure and sensitivity have been brought together in a map to see which regions might benefit from lighter lockdown measures and have a tourism industry which is particularly sensitive to positive effects of the pandemic (see Map 3.4).

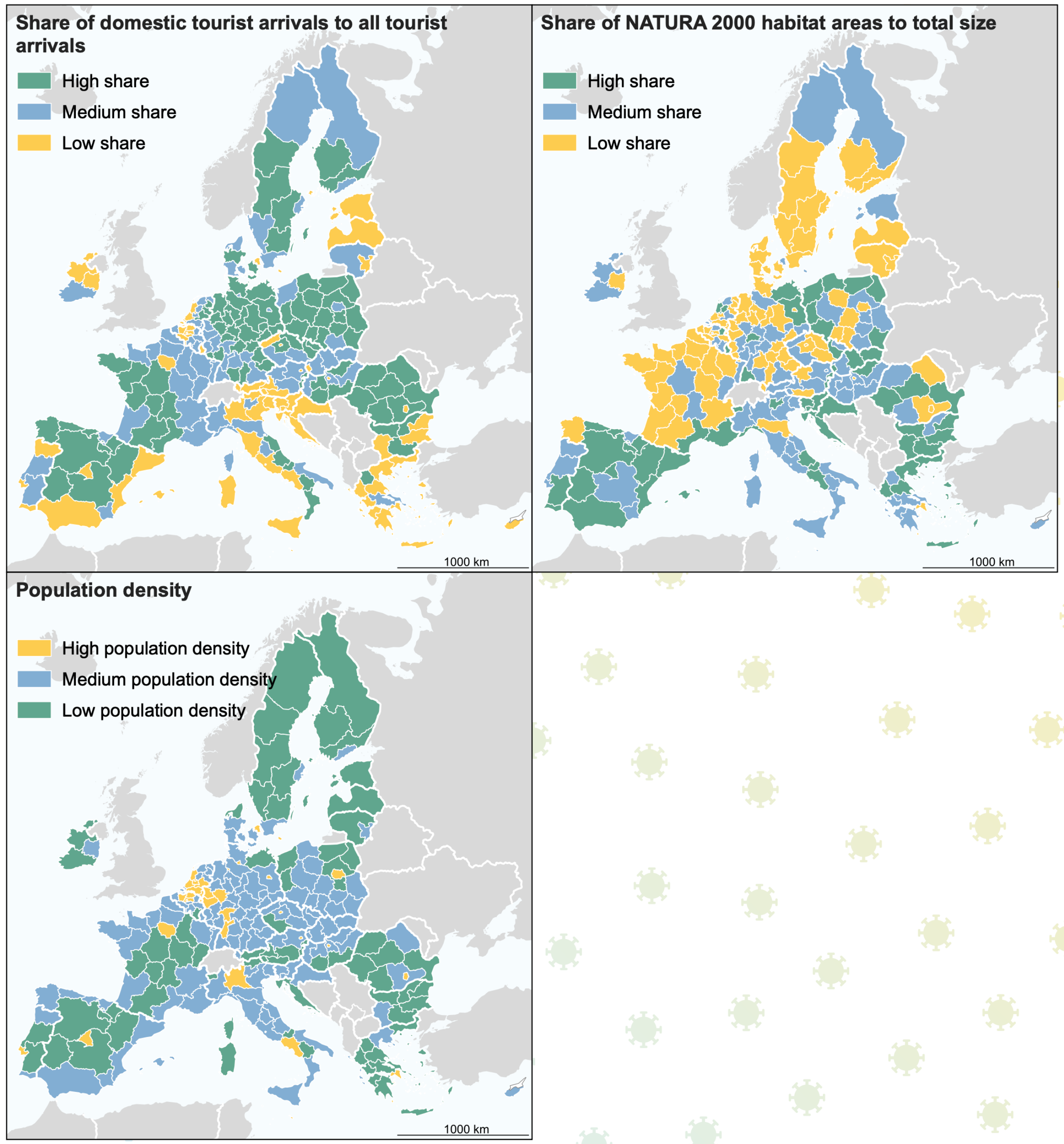
The regions where the tourism sector could benefit from the pandemic have high sensitivity and low exposure. This includes most regions in Bulgaria, Finland and Sweden, as well as Burgenland and Styria in Austria, Prov. Limburg in Belgium, Adriatic Croatia, the two Eastern regions of Slovakia (Stredné Slovensko and Východné Slovensko), Eastern regions in Poland (Świętokrzyskie, Lubelskie, Podkarpackie and Podlaskie), Sud-Vest Oltenia in Romania, and Northern Hungary (Észak-Magyarország) and the Southern Great Plain (Dél-Alföld) in Hungary.

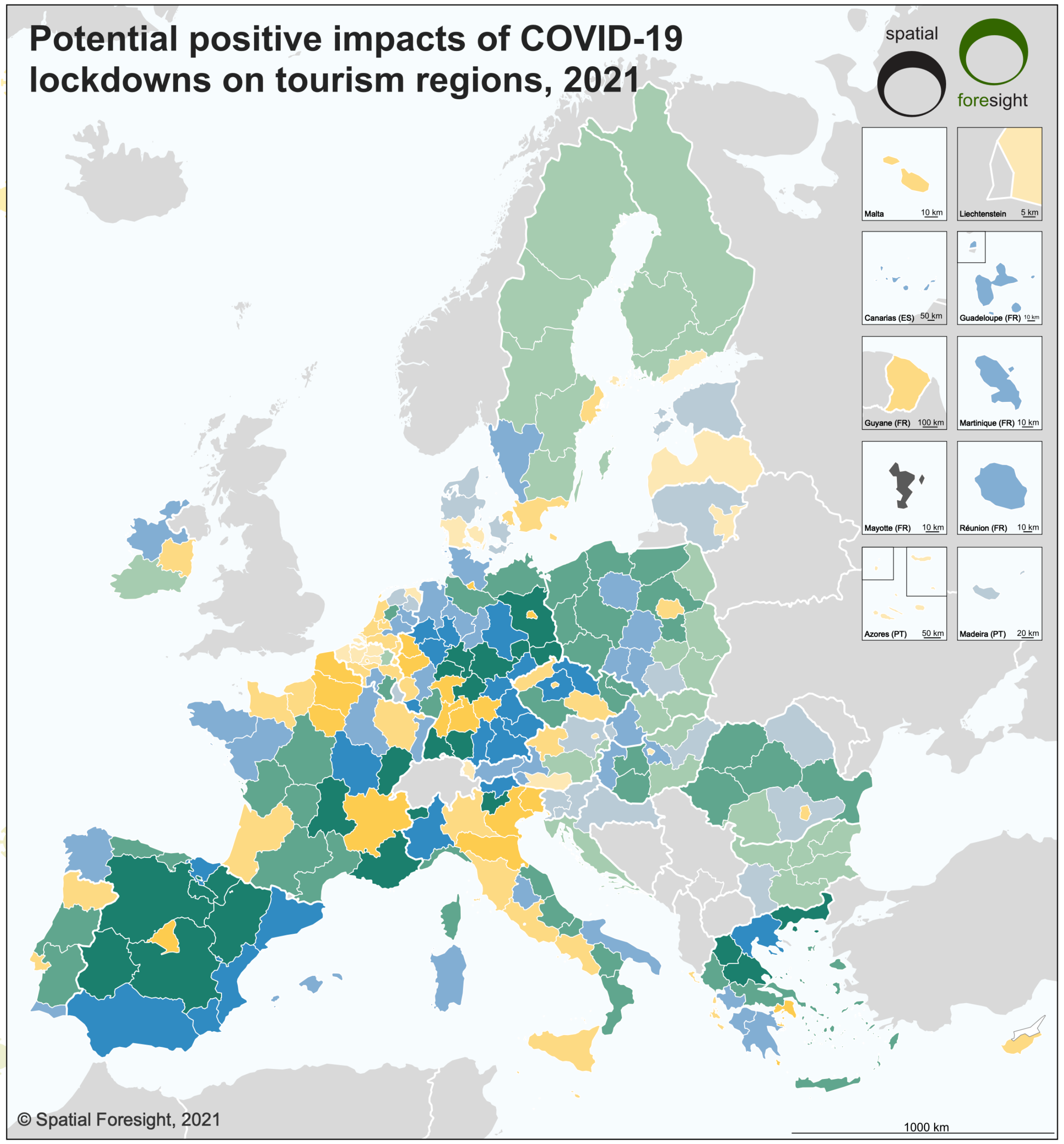
For 2021-27 Cohesion Policy regions, less developed and transition regions are more likely to benefit from positive effects than more developed regions. 56% of less developed regions and 46% of transition regions have high sensitivity, while only 19% of more developed regions do. This is also confirmed by 49% of the more developed regions showing low sensitivity, while is the case for only 12% of less developed and 19% of transition regions.

This analysis is only a rough proxy for areas with potential positive impacts. There is insufficient comparable data for a more nuanced geographical assessment. Still, it shows that the pandemic also brought benefits for some in the tourism sector.

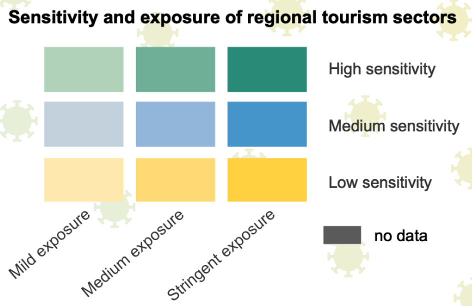
Nevertheless, potential positive impacts are by far outweighed by negative impacts.

Map 3.4 Potential positive impacts of COVID-19 on tourism regions





Administrative boundaries: Eurostat GISCO, NUTS 2 (2016)



Source: own elaboration based on the following data inputs

Sensitivity: Regional population density, dataset 'demo_r_d3dens' (accessed 05 January 2021, Eurostat), regional share of area classified as NATURA 2000 habitat (Spatial Foresight, based on EEA) and share of domestic tourist arrivals (Spatial Foresight, based on dataset 'tour_occ_nin2' (accessed 05 January 2021, Eurostat), observatoire des territoires, enquête de fréquentation dans l'hôtellerie (accessed 05 January 2021, INSEE).

Exposure: Indicators from government response tracker: stringency index, imposed domestic and international travel restrictions (School of government at Oxford University) and COVID-19 infection rates at regional level (ECDC).

Source: own elaboration

3.2.4 Regional typology of possible impacts

Not only geographical variation but also the magnitude of COVID-19 socioeconomic impacts need to be considered. There are various estimates about the economic impacts of lockdowns and the decline in added value and employment for tourism.

The high levels of uncertainty for COVID-19 impacts – due to missing data as well as the fact that the pandemic is still ongoing – make it difficult to quantify the impact on tourism regions.

However, the above analysis and literature findings suggest a number of decisive factors explaining the magnitude of the impact on local and regional economies (Joint Research Centre, 2020; OECD, 2020b; WTTC, 2020):

- **Dependency on international tourists:** Destinations dependent on international markets are likely to be the most affected (particularly long-term), while in the medium-term tourists may prefer national destinations, though travel outside the home country will continue.

- **Urban areas:** Urban destinations with business and MICE tourism are among the most affected areas, although they may recover quickly.

- **Mass tourism areas:** Previously overcrowded destinations could see major reductions in tourism beyond current lockdowns and travel restrictions. These places may need to reconfigure their development model and tourism offers.

- **Coastal & skiing areas:** Coastal regions with more visitors are expected to be the most impacted. Given that the pandemic also affects the winter tourist season 2020/2021 which is not covered in the literature so far, we can assume the same goes for some mountain regions.

- **High reliance on tourism:** Areas with low levels of economic diversity and a heavy reliance on tourism to support local jobs and businesses are more vulnerable to impacts of the pandemic.

- **Less known and rural areas:** Smaller rural and less known destinations may become more popular, replacing large tourist destinations and may benefit from the pandemic especially when they have a large domestic market.

- **Seasonality:** The JRC (2020) highlights that economies in tourism hotspots will be more vulnerable to travel restrictions, taking into account seasonality and the scale of tourism relative to the size of the local population.

Bringing together various insights on COVID-19 impacts on tourism regions and their intervention logic, suggests at least five types of region (see Figure 3.6).

Most affected / challenged areas. These are destinations with limited potential to replace international with domestic tourism as well as a high share of the regional economy and employment depending on tourism. They will be severely hit by the loss of the 2020/21 tourism seasons and a probable slow pick up of international travel in years to come (see also Map 3.3). These areas might need to consider rejuvenating their tourism products as the pandemic could affect the entire lifecycle of their destination (see also section 2.1.3).

Figure 3.6 Different COVID-19 narratives for tourism regions

Most affected / challenged areas	Tourism 'hinterland'	National replacement tourism	Welcome decline	Tourism innovation potential areas
• Often in countries with limited potential for replacement by more domestic tourists • Often in regions with high share of employment in tourism but small share of the value chain	• Indirect effects (decline in demand from tourism) • Often modest regional dependency on tourism • Transport sector (airlines, airports, cruise industry)	• Often in countries/regions less dependent on international tourism • Often in rural areas leading to discussion about new overtourism areas	• Areas that needed to rethink their tourism strategy prior to COVID-19 • Areas which have overinvested in tourism (transport) infrastructure	• Areas with key players in the tourism ecosystem • Access to funding and good governance

Source: own elaboration

Tourism 'hinterland' (second level in the ecosystem). Many regions in Europe depend on tourism, without being primary destinations. These are regions in the second level of the tourism ecosystem as service or goods providers to tourism destinations or homes to major tourism transport players (airlines, airports, cruise industry etc.) and travel agencies. These 'tourism hinterland' regions are affected by the decline in tourism but often have modest regional dependency on tourism.

National replacement tourism. Some areas might be less affected or even benefit from new tourism demands due to COVID-19 (see also Map 3.4). These are often in countries with high levels of domestic tourism which prior to COVID-19 were less dependent on international tourism. They are often less densely populated or rural areas with a focus on nature or small city tourism. These areas might be less affected by the decline in tourism and may even benefit from replacement tourism, as people substitute international with domestic tourism. For some areas digital nomads – both national and international – helped to replace declining tourist numbers during the pandemic (Richards, 2020).

Welcome decline. In many tourism hotspots, the decline in tourism means less pressure on infrastructure, the environment and the local population. Local citizens have a chance to reclaim their cities (OECD, 2020b, p. 11). As mentioned, some areas in Europe suffer from overtourism (see section 2.2.3) and for some of these the decline in visitor numbers could be a temporary relief from tourism pressure. There are anecdotes about citizens in Amsterdam, Venice, Barcelona, Paris and Berlin being happy to have the opportunity to reclaim their cities. Welcome decline might also concern regions with oversized tourism infrastructure, where the pandemic gives a final push to start thinking about alternative uses for tourism infrastructure and regional development, rather than hoping for tourism numbers to pick up. This can either be formerly prosperous tourism regions which have entered the decline or stagnation lifecycle phase (see section 2.1.3), or regions with overinvestment in tourism which never found sufficient demand. This not only concerns tourism destinations, but also regions with oversized regional airports. For these the decline could offer the possibility for fresh thinking about excess infrastructure and misguided regional development strategies.

Tourism innovation potential areas. Last but not least, there are regions that do not waste a crisis and have sufficient innovation potential to use the current situation to adjust their tourism products to better fit future demands. These are often areas which are home to key players in the tourism sector or have good governance as well as access to financial resources to invest in innovation and new tourism products. A possible glimpse into such tourism innovation potential areas is provided in Map 2.7.

COVID-19 impacts and types of tourism regions

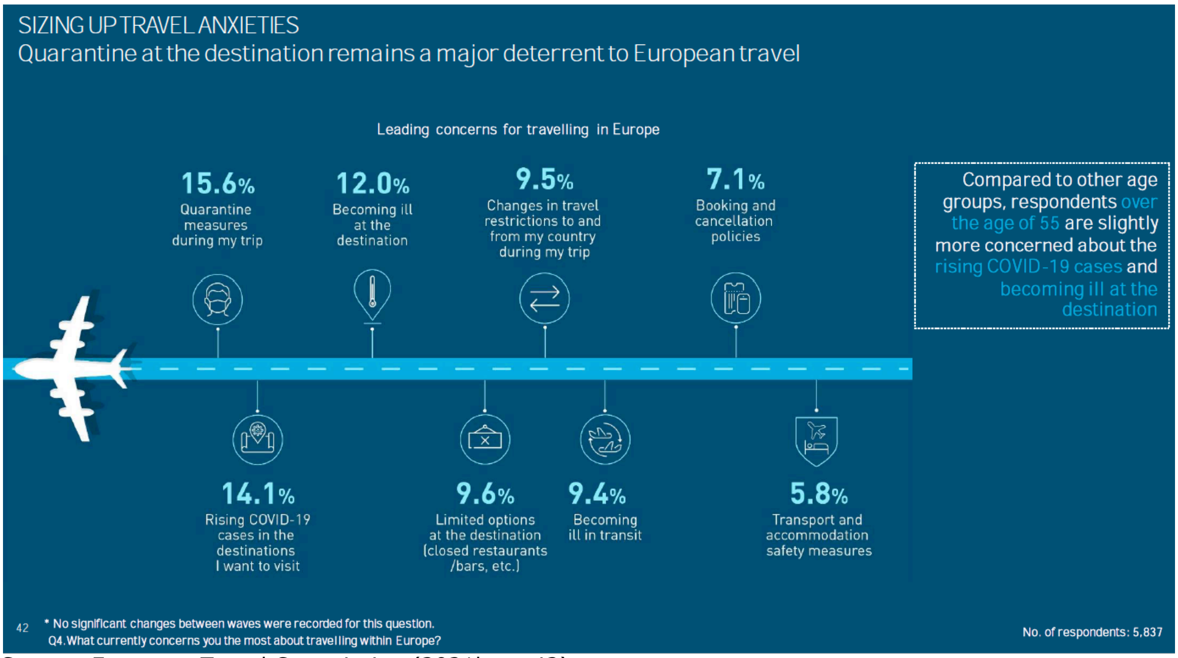
The types of tourism regions that we defined earlier in this report saw a wide range of COVID-19 impacts on tourism. Specific examples of region types show various severe, less harsh and even positive effects, even within one type. Overall, 'Beach Beauty' and 'Cosmopolitan' regions show the biggest drop in visitor figures and severe negative effects on accommodation, catering and tourism activities. Only a low share of the usual international and EU tourists could be replaced with domestic tourism. 'Beach Beauty' regions were hit particularly hard, as their regional economy usually depends more on the tourism value chain, while urban 'Cosmopolitan' regions suffered not only from less tourism but also from less transport, less events and less shopping, normally associated to some degree with tourism. Due to partial openings, 'Jagertee' and 'Sea Breeze' regions benefitted from some, mostly domestic, tourism in summer 2020. Overall, they saw important losses in 2020, but not so drastic as the aforementioned types. However, 'Jagertee' with a focus on winter tourism suffered from the winter 2020/21 lockdowns and an almost total loss of business in the winter and spring of 2021. Regions with more rural and natural 'Spritz' tourism experienced fewer negative effects, and some holiday types such as camping or holiday home, even increased their business in summer 2020.

3.3 Outlook for the coming months

Travel in the foreseeable future has been affected by COVID-19, as have concerns and preference when travelling.

As shown above, booking and travel search indicators indicate that travel will not fully recover in the coming months and most experts expect travel to only reach the levels of 2019 in a few years. For some sectors – in particular business travel – an even longer period of modest levels could be possible as videoconferencing has become more widely accepted. Other areas might see catch-up effects.

Figure 3.7 Travel anxieties in times of COVID-19



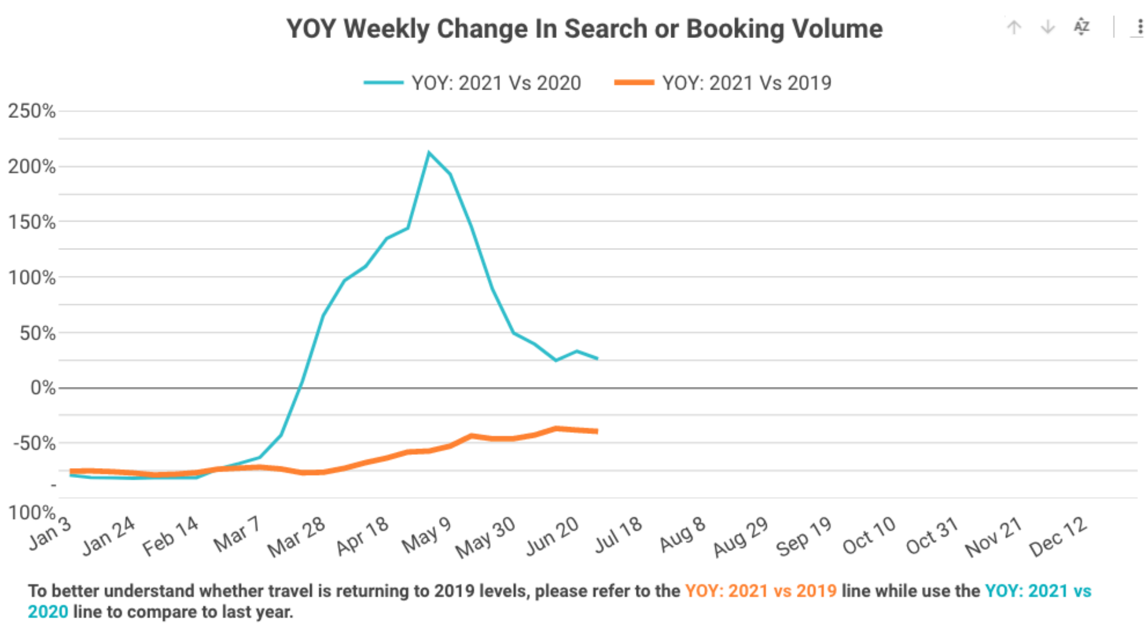
Source: European Travel Commission (2021b, p. 42)

For the near future, travel and tourism will come with new cautions and anxieties. Firstly, travelling within the EU comes mostly with additional administrative hassle. This includes frequently changing restrictions and requirements in some countries, additional paperwork for intra-EU travel such as vaccination certificates, COVID-tests or travel forms detailing the purpose, time and destination of travel. Once the administrative burden has been passed travelling might be affected by new COVID-19 related anxieties. Among them, the fear of quarantine during the trip, rising COVID-19 infections at the destination, or becoming ill at the destination (see Figure 3.7) as shown in the survey by the European Travel Commission (2021a, p. 42) in early 2021.

The impact on travel of new COVID-19 travel burdens and anxieties was also felt during the 2021 summer season. Although tourist numbers increased again across Europe – not least thanks to vaccinations – uncertainties about safe and seamless travel remained for many people. Variations in regulations and restrictions and in some cases still the necessity to get additional papers in addition to the COVID-19 certificate of one's country of residence made travelling more burdensome.

Nevertheless, Europeans long to travel and are planning future trips and holidays. Although as shown above, bookings at end-December 2020 were some 90% lower and Google-searches were in June 2021 still 50% to 70% lower than in the corresponding week in 2019 in Europe (see Figure 3.8 and Figure 3.3).[8] Further analysis of searches by tourism segments in terms of flights shows a decline in June 2021 for domestic flights of 43%, international flights - 80%, international tourist arrivals - 83% and actual air reservations - 92% compared to 2019 (see Figure 3.9).

Figure 3.8 Evolution in search or booking volume Jan 2020 to June 2021



Source https://www.sojern.com/covid-19-insights/#report (EU 27 selected)

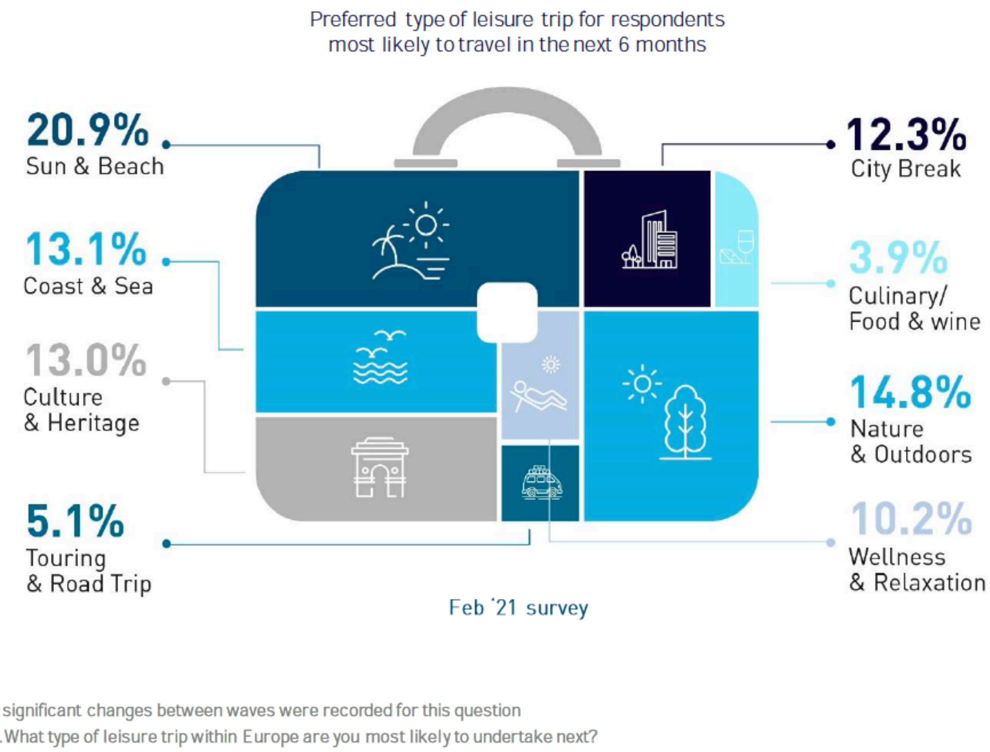
[8] See https://www.sojern.com/covid-19-insights/#report and https://www.unwto.org/unwto-tourism-recovery-tracker

Figure 3.9 Evolution in search or flights Jan 2020 to June 2021

https://www.unwto.org/unwto-tourism-recovery-tracker

Europeans were looking forward to sun & beach, nature & outdoor and coast & spa trips when asked on the preferred type of leisure tourism in the first half of 2021 by the European Travel Commission (European Travel Commission, 2021b).

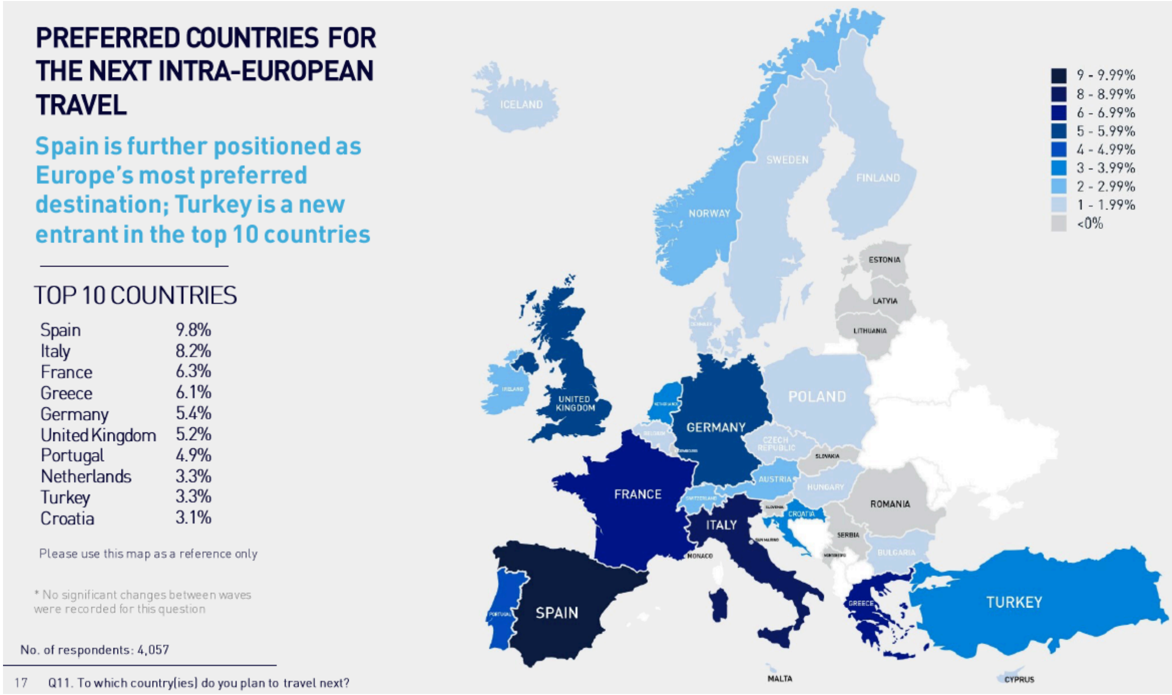
Figure 3.10 Preferred type of leisure trip in the first half of 2021



Source: European Travel Commission (2021b, p. 19)

The preferred destination-country seems not to be heavily affected by COVID-19. Spain, Italy, France and Greece still top the list in the European Travel Commission survey (2021a, p. 17), as shown in Figure 3.11. Compared to the figures underpinning Map 2.1, it seems Austria ranks lower for preferred next intra-EU trips, which might have to do with the timing and forthcoming summer tourist season when the survey was conducted.

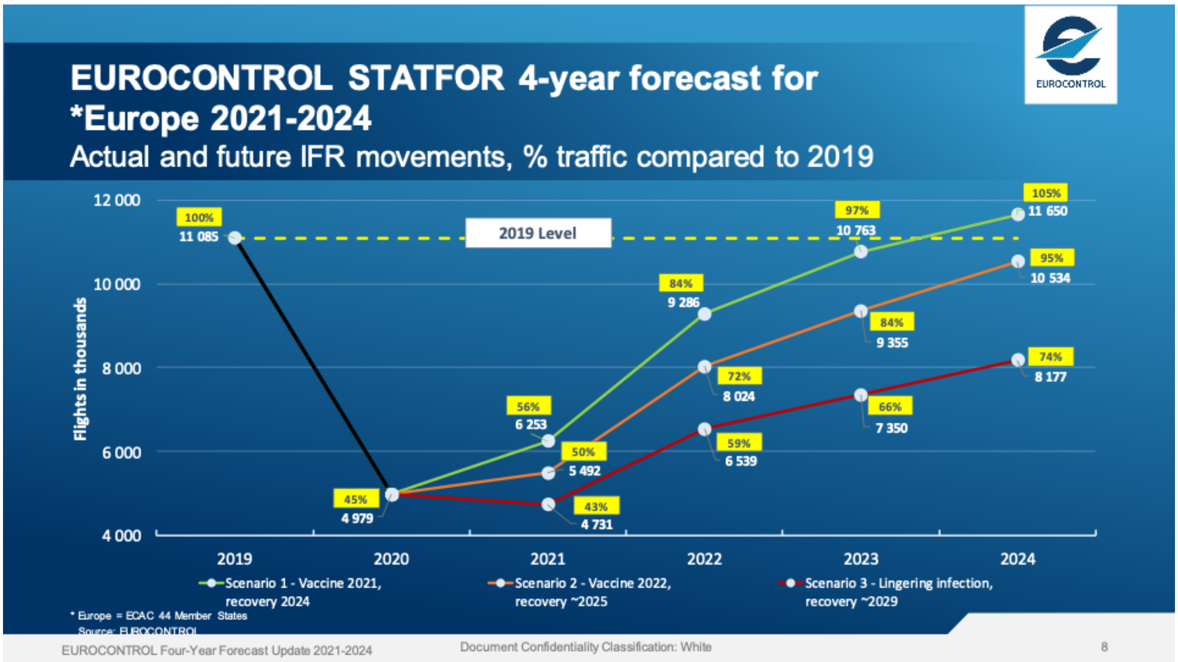
Figure 3.11 Preferred countries for the next intra-European travel



Source: European Travel Commission (2021a, p. 17)

Expectations for how quickly tourism will pick up and reach the level of 2019 vary between 1 and 5 years (see also section 3.1). Among others, EUROCONTROL has developed scenarios for the recovery of air traffic depending on the speed and success of vaccinations. In the best case, flights will be back at 2019 levels by 2024 (see Figure 3.12). At the same time, there are expectations that air traffic might recover earlier, driven by airport slot requirements. Following the onset of the COVID-19 pandemic, European regulators suspended or relaxed requirements for airlines to fly at least 80 % of the time to hold on to highly priced take-off and landing slots at airports. Once these are reinstated, airlines might be forced into operating more flights to keep their start and landing slots.

Figure 3.12 Forecast flights in Europe 2021-2024



Source: EUROCONTROL (2021, p. 8)

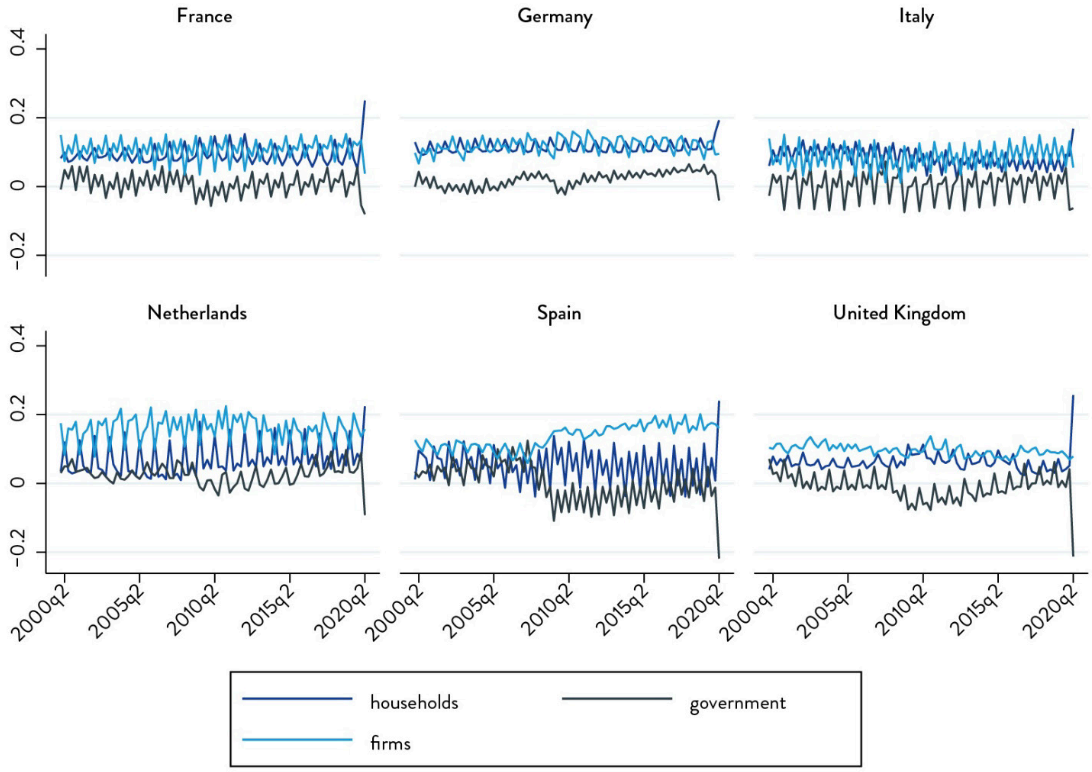
These scenarios on the evolution of flights will also affect the aviation industry in Europe. In its issue of 06 July 2021, the Economist[9] expects the return of short-haul international travel to give a leg up to European low-cost carriers. The return of demand for holidays and visits to families and friends will benefit airlines with little debt and lots of cash to spend (e.g. Ryanair and Wizz Air) rather than large flag-carriers which required government support during the pandemic (e.g. Lufthansa and Air France-KLM). This may affect not just the recovery but also the longer-term positioning of airlines in the European market.

A possible welcome side effect of the pandemic might be that household savings have increased substantially in 2020 (see Figure 3.13). While government savings have been drained by policies to mitigate the economic effects of lockdowns, households increased their savings. When travel restrictions fall and people feel confident about going on holiday, they may well spend some of these savings on holidays or a buying spree during their holidays. In the medium-term this might generate extra income for some players in the tourism sector.

Some of the expected longer-lasting impacts of the pandemic include points addressed earlier in this report (Joint Research Centre, 2020; OECD, 2020b; WTTC, 2020). Among these are the shift to more domestic tourism (see section 3.2.3), lower traveller confidence (see e.g. Figure 3.7) and structural changes in the tourism industry (see section 3.2.4) as well as longer term trends related to sustainability and digitalisation which are addressed in section 4. The OEDD has summarised a first take on long-lasting tourism policy implications in Figure 3.14.

[9] Economist https://www.economist.com/business/2021/07/06/which-airlines-will-soar-after-the-pandemic

Figure 3.13 Gross savings as a share of GDP by sector



Source: Gropp and McShane (2021, p. 14)

Figure 3.14 Long-lasting tourism policy implications

Box 2. Potential long lasting tourism policy implications: initial country views

Sustainability may become more prominent in tourism choices, due to greater awareness of climate change and adverse impacts of tourism. Natural areas, regional and local destinations are expected to drive the recovery, consequently shorter travels will result in a lower environmental impact of tourism.

Domestic tourism is expected to gain in shares and flows, as people prefer to stay local. Domestic tourists are often more price-sensitive and tend to have lower spending patterns.

Traveller confidence is expected to be lowered due to the ongoing uncertainty. This may lead to a decline in tourism consumption that might continue well long after the initial shock.

Safety and hygiene are becoming a key criteria to select destinations and tourism activities. People are likely to prefer 'private solutions' when travelling, avoiding big gatherings, and prioritising private means of transport, which may have an adverse impact on the environment.

Structural change in tourism supply is expected across the ecosystem. Not all businesses will survive the crisis and capacity in the sector is likely to be reduced for a period.

Skills shortages in tourism may be exacerbated, as many jobs are lost and workers will redeploy to different sectors.

Reduced investment will call for active policies to restore investment in the tourism sector with the aim of promoting a sustainable recovery of the sector

Digitalisation in tourism services is expected to continue to accelerate, including a higher use of automation, contact-less payments and services, virtual experiences, real-time information provision.

Tourism policy will need to be more reactive and in the long term it will move to more flexible systems, able to adapt faster to changes of policy focus. Crisis management will be a particular area of focus.

Source: OECD (2020b, p. 6)

4 Tourism trends

The constantly changing world of today will continue to affect tourism. It is important to look at changes that may affect the tourism ecosystem. Forward-looking processes help in dealing with uncertainties and being more prepared for the future. Many EU Member States have carried out future-oriented initiatives to see changes and trends in tourism and to position themselves accordingly.

Country examples – Forward-looking processes

Germany has built expertise on long-term trends through a Centre of Excellence for Tourism to support Tourism Ministry objectives by monitoring and analysing economic, social and technical developments. 'Tourism 2030' is a forward-looking result of this process, looking into changes such as digitalisation, the sharing economy, increasing mobility and personalised tourism. Looking into sustainability, climate change, terrorism and violence are also part of the research (OECD, 2020a).

Flanders in Belgium worked with stakeholders on developing a tourism vision to adjust and change its policy for new developments, supporting networks and local people. (OECD, 2020a).

Other governments have taken steps towards embedding more sustainability in tourism to help local communities benefit more from tourism. Finland, for instance, is looking to become the most sustainable and prosperous tourism destination in the Nordic region.

Sweden set a long-term strategy to 2030 for sustainable tourism to meet both national and global challenges. (OECD, 2020a). Looking at developments, trends and wild cards and their impact on tourism and different territories helps visualise the future and better plan policies.

A trend is an emerging pattern of change, likely to impact large social groups and may require action and response. Trends can be emerging, maturing, close to peaking or peaked, as well as weak, medium or strong. Megatrends are overarching forces that may affect different areas over the next 10-15 years, influencing a wide range of activities in different sectors and being underlying forces that drive other trends. Examples of megatrends are demographics, the rise of the middle class, climate change, technological progress and innovations. (Foresight Platform, n.d.)

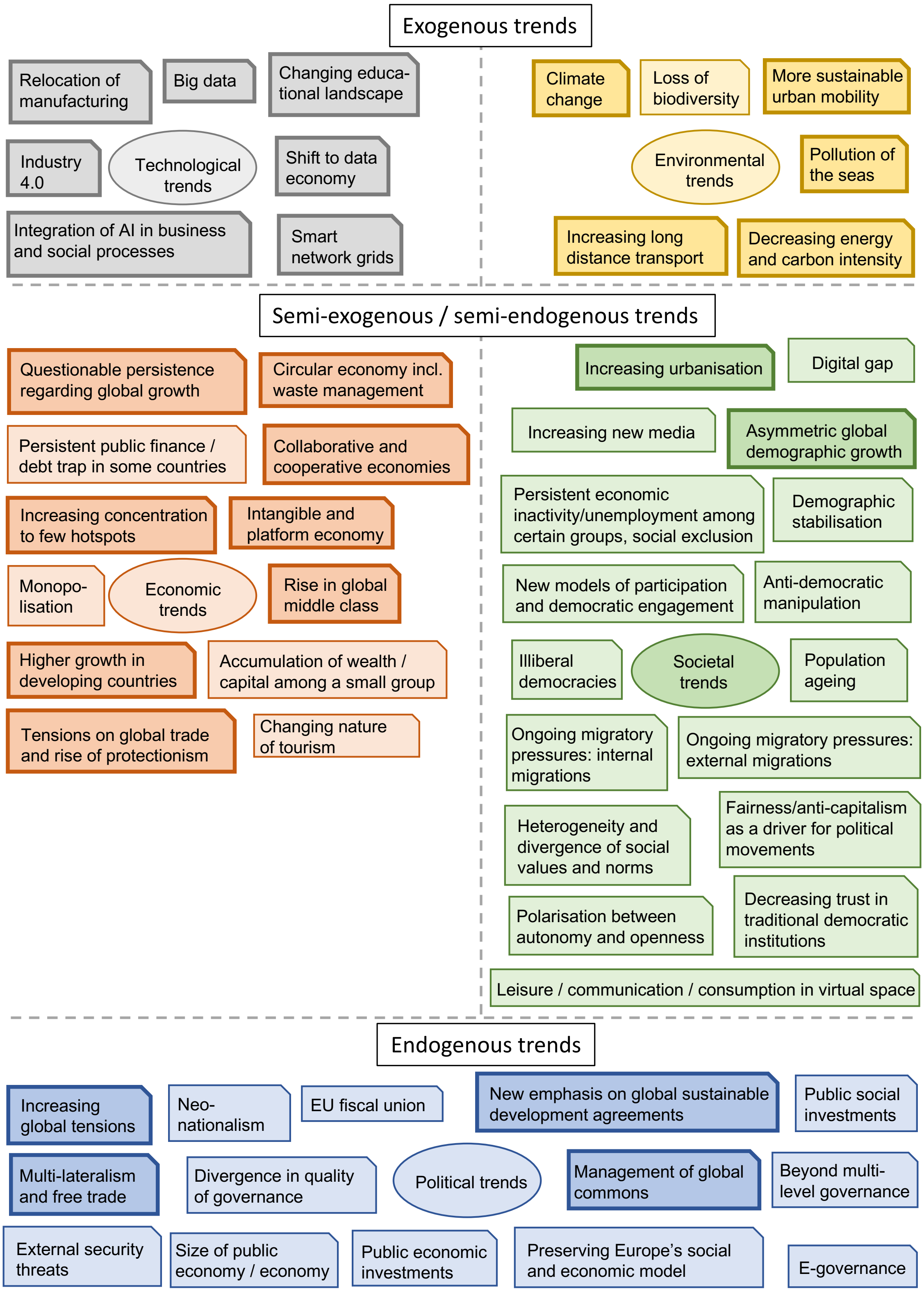
Trends can also be exogenous or endogenous as seen in Figure 1 (Böhme et al., 2019; ESPON, 2019). Exogenous trends cannot be influenced by policy making, while endogenous trends can. There are political, economic, environmental, social and technological exogenous and endogenous trends which may influence territories and people in different ways. Climate change, biodiversity loss, population ageing, the 4th industrial revolution, collaborative economies, big data, increased global tensions, neo-nationalism and e-governance are only a few of the trends that may influence global and EU territories.

Trends are usually interconnected, with one influencing others in different ways. Hence, trends should not be seen individually but in a more systemic way. There can be different perspectives for looking at trends related to tourism, such as a focus on the impacts of megatrends, or specific trends. There are also the technological, political, economic, environmental and social perspectives or for tourism, supply and demand. Trends can also be reviewed based on their stage, magnitude or territorial impact.

In addition to trends and megatrends, wild cards may influence the future in unexpected ways. Wild cards are surprising and unpredictable events that may result in considerable impacts which could significantly change the future. Wild cards interact with trends and may deeply disrupt, accelerate, slow down or pause them (Forward Thinking Platform & The Global Forum on Agricultural Research, 2014). A recent wild card is the COVID-

19 pandemic, which has enormous social and economic consequences, dramatically influencing tourism with possible further consequences for tourism types and the regional importance of tourism.

Figure 4.1 Endogenous and exogenous trends



Source: Böhme, Lüer, & Toptsidou (2019, p. 179)

The supply side (among others) of the tourism sector may be influenced by political trends. Global geopolitical tensions and threats raise safety and security concerns, visible also in coastal and island tourism, including in the Mediterranean (ECORYS et al., 2016). Furthermore, new regional free trade agreements, changes in border regulations, regional political instability and conflict and a new 'cold war' are political trends that influence tourism. (Scott & Gössling, 2015). In addition to these, terrorism is another factor. A characteristic example is the negative effect of terrorism on tourism in regions such as Northern Ireland and the Basque Country. Further examples are 9/11 and terrorist attacks in several EU capitals. Forecasting shows that terrorist incidents reinforce negative trends (Achilleos, 2016).

Economic trends also influence the supply side of tourism. Economic growth, financial sector instability and growing income disparities are trends affecting tourism (Scott & Gössling, 2015).

Trends affecting the future of tourism regardless of the pandemic

Before addressing tourism trends affected by COVID-19, it is worthwhile recalling some of the overarching trends which will shape our future and also affect tourism destinations and industries independently of the pandemic (cf. Böhme et al., 2021).

Climate change and biodiversity loss. The biggest challenges in the decades ahead remain climate change and the loss of biodiversity. Even if the urgency of addressing climate change and biodiversity loss has been overtaken by the pandemic, it has not gone. On the contrary, dealing with the pandemic will influence how we deal with climate change. The pandemic could shape an economic and societal transition towards carbon neutrality and more global justice. Climate change will affect development perspectives and tourism in the decades to come. Biodiversity loss as well as land and sea pollution will become ever more relevant. In terms of tourism, more extreme weather events such as storms, floods and heatwaves – as well as temperature changes such as less snow in skiing areas – will pose new challenges to destinations and might affect people's travel preferences. Also, changing values may shift travel preferences and choices towards more sustainable tourism offers. One example is the debate about 'flygskam' also known as flight shame.

Ageing and migration. Demographic change with ageing as well as domestic and intra-European migration, will continue regardless of the pandemic. For a few more years the population in Europe will grow before declining, with ageing offset by migration rather than natural population growth (Brandmüller et al., 2018; JRC, 2021) The EU-27 is expected to decline from 447.6 million people in 2020 to 441.2 million in 2050 with the median age expected to increase from 43.9 years to 48.2 years. This means by 2050 there will be less than two people of working age for each person aged 65 and over. These demographic dynamics will affect the tourism sector both through the need to adjust to a greying target group, as well as the risk of increasing labour shortages in the hospitality sector.

New technologies. Technological progress is a driver of economic and social change, potentially substantially impacting spatial development in Europe. New technologies and a 4th industrial revolution blurring the lines between physical, digital and biological systems are expected to be disruptive. Working methods, social engagement as well as industry, health and education systems will be transformed. This will severely affect territorial development and alter tourism. Increasing digitalisation in the tourism sector including computers, artificial intelligence and robots replacing some staff in the hospitality sector are just first experimental steps exploring how new and emerging technologies can alter travel experiences and the hospitality industry.

Overarching trends, as mentioned earlier, happen anyway and have more long-term impacts on tourism, while they interact, change or result in other trends. An example is an ageing population meaning tourism must adapt to elderly tourist needs, so accessibility may grow in importance (ECORYS et al., 2016). Population growth may increase environmental pressure and demand for services. The promotion of cultural authenticity, with protection, promotion and maintenance for indigenous communities can be a leverage for tourist destinations (OECD, 2020a). In the same sense a growing recognition of the diversity of our societies (e.g. LGBTQ+) translates into diverse tourism offers and destination profiles.

For the purposes of this report, we will look at trends from the supply side, so the focus will be on how the supply side needs to adjust or diversify. This approach will offer a straightforward path towards more action-oriented recommendations and look into the tourism sector in more detail. We look at trends based on whether they are emerging or have peaked and their magnitude, whether they are weak, medium or strong. We particularly focus on the influence that the COVID-19 wild card has brought to different trends and combine this approach with the stage the trends are at. Bringing these together, we identified two categories:

- Peaked and paused trends. Trends 'at their peak' were paused or slowed due to the pandemic and its measures.
- Emerging and accelerated trends. These were emerging even before COVID-19, and the pandemic has accelerated them significantly.

This approach will allow for more coherence in observing the trends, also looking at interaction with the COVID-19 wild card. The pandemic has not yet brought additional trends but has influenced existing and emerging trends.

Although the literature is already rich in the field of tourism-related trends, we have selected the most relevant to the supply side perspective, stage, magnitude and COVID-19 relationship.

4.1 Peaked and paused trends

Some trends have been around for some time and are no longer growing. COVID-19 pandemic measures have resulted in pausing these.

Mass and overtourism are not new developments in the tourism sector (see also section 2.2.3). These peaked developments have a strong and sometimes disruptive effect on the environment, economy, society and culture. This unbalanced tourism may result in the degradation of natural and historical sites, landscapes and public spaces leading to identity, authenticity and environmental loss for tourism destinations. Technological developments have also contributed to the increase of mass tourism, as computerised reservation and international payment systems are considered foundations for mass international tourism, allowing more tourists access to tourism products (Scott & Gössling, 2015). City destinations are an example where local culture and communities are often not respected. With the increase in social media, tourists are more interested in 'meme tourism' rather than contributing to the local economy (OECD, 2020a). The tourism supply side needs to adjust to these changes, increase its capacity to manage overtourism and constantly change the product offer, especially in places exposed to overtourism and particularly during peak periods. At the same time, the increased numbers of accommodation platforms, such as Airbnb, require further adjustment from the supply side to new markets and more competition, especially in urban areas with city tourism (OECD, 2020a).

Increased cruise tourism has also peaked for many destinations in Europe. It also results in overtourism and congestion, particularly for islands and coastal areas and their hinterlands. The trend magnitude is strong, as it influences the economy, the environment and society. The supply side needs to adjust infrastructure, provide easy access and different products, while at the same time ensuring more strategic and sustainable tourism (OECD, 2020a).

At the dawn of the new decade, overtourism and mass tourism moved to no-tourism with international, regional and local travel restrictions affecting tourism (Gössling, et al., 2021). However, the first measures to reduce overtourism were initiated before the COVID-19 outbreak The pandemic brought social distancing measures and further restrictions, making overcrowded places and mass tourism impossible. International air travel slowed significantly, global flights dropped by more than half and airport hubs have been challenged (Gössling, et al., 2021). The tourism supply side was already affected by these challenges and there were changes in existing trends, from accommodation to catering and other local businesses (Gössling, et al., 2021).

Country examples – Dealing with peaked trends in tourism supply

Croatia and the City of Dubrovnik launched an initiative called 'Respect the City' to reduce the negative effects of tourism. Cruises and tourism seasonality increase the burden on the area, threatening its cultural heritage. Better visitor management and transport coordination was the first step towards more sustainability, while the supply side also supported the development of different standards for more positive outcomes.

Controls on cruise ship arrivals were also implemented on the island of Santorini in Greece, to regulate tourist flows which overburden the island, as well as to disperse tourists across the island instead of concentrating on particular places. This will help the tourism supply side come into line with management capacity.

(OECD, 2020a)

Also highlighted by the pandemic was the change in tourist behaviour. The shift is moderate but requires adaptation from the supply side to accommodate new wishes of tourists. This behavioural change has driven other trends, such as tourist preference and behaviour, as people shift towards more familiar, predictable and trusted tourism, including domestic destinations with outdoor activities (European Travel Commission, 2020). In short this mindset shift accentuates three key trends for post COVID-19 tourism: domestic tourism, low overcrowding and nature and outdoor activities (Santos et al., 2020). The change in tourist behaviour also reflects a shift towards personal well-being and fitness, less impact on the environment, domestic travel with easy car access, open space access and privacy, as well as avoidance of crowded destinations and activities (WTTC, 2020). This may also result in a shift to more travelling by car or caravan to accommodate the desire for safety, with less infection risk than when mingling with others on trains, buses, airplanes. It is also more seamless, less prone to restrictions following changing COIVD-19 travel requirements.

The relative importance of domestic tourism has been discussed in relation to the origin of tourists shown in Map 2.5. Domestic tourism is not a new phenomenon but is an exception to the peaked trends and has been accelerated by COVID-19 (see also section 3.2.4). Domestic tourism resumes quickly as the pandemic slows, being the preferred destination-type, at least in the short term (WTTC, 2020). In addition, there is more travel closer to home to reduce risk and avoid travel restrictions (European Travel Commission, 2020). International tourism, on the contrary, declined by 60% in 2020 (OECD, 2020e) and expectations for it resuming are lower (Santos et al., 2020). Shorter trips, more easily reachable by car are preferred, so destinations close to urban centres may see tourism resume faster than harder-to-reach destinations.

Country examples – Promoting domestic tourism in the times of COVID-19

The supply side of domestic and regional tourism in cooperation with authorities has promoted incentives for tourists to explore nearby destinations, bringing onboard tourism organisations, shopping outlets, hotels and restaurants (WTTC, 2020). Examples are travel vouchers in Iceland (WTTC, 2020) and accommodation vouchers in Luxembourg. Tourism campaigns have also been launched in countries such as Italy and the United Kingdom (WTTC, 2020)

Furthermore, the preference for safer, seamless and less crowded tourism is another outcome of the pandemic. Safety is now a top priority for tourists and their behaviour may be guided by distancing and increased hygiene protocols. So, at least short- to medium-term the tourism supply side will need to work together and adjust, delivering trust and preparing for this change (WTTC, 2020). In addition, this may link preferences towards less crowded destinations such as rural or nature tourism, reducing the effects of mass tourism. (Joint Research Centre, 2020).

4.2 Emerging and accelerated trends

Emerging trends are developing but have not reached a peak. This does not mean they are new trends, but they can emerge from existing trends. The table below gives an overview of important trends emerging before COVID-19 and centring mainly around sustainability and innovative technological solutions.

Table 4.1 Important Trends in Tourism (pre-COVID-19)

Trend	Related Area
Safe and Seamless Travel	• External and internal connectivity • Intermodality, multi-modal transport • Enable sustainable growth by handling travellers more efficiently • Enhance traveller safety • Improve sustainability by managing visitor flows and promoting alternative travel modes • Smart destinations • Digital traveller identity, visa requirements, European e-Visa • Travelling by car/caravan (instead of air, rail, bus)
Sharing/Platform economy	• Streamlining regulation of the sharing economy • Blockchain solutions • Digital sales and distribution
Sustainable governance and management of destinations	• Mobilising digital solutions for more effective administration • Forward-looking marketing strategies • Professional country marketing • Use of artificial intelligence and big data in marketing and promotion • Quality standards for sustainable and smart destinations • Use of Augmented Reality/Virtual Reality (AR/VR) • (Safe) visitor handling, information and management • Tracking and tracing visitors • Reliable health and safety information on locations and facilities
Sustainable and responsible tourism	• Less use of resources by tourists (land, water, energy) • Circular economy approaches to reduce waste • Ecolabels and sustainability standards in tourism • Less CO2 through low-carbon transport for leisure and business • High-speed and night trains as alternatives to air travel
Leveraging tourism as a catalyst for regional and rural development	• Tourism as a source of employment • Better quality employment and skills development • Secure and fair working conditions • Tourism as an inclusive activity • Exploit links to other sectors (retail, food production, fisheries, bioeconomy, etc.)
Developing the tourism product	• Community-based tourism • Age-related offers • Luxury tourism (responding to health & safety concerns) • Accessible Tourism • Thematic products and routes • Off-peak and less seasonally dependent products • Quality standards for products • Further develop specific high-value markets and products (health tourism, MICE) • Digitally enhance tourism business models • Digital nomads as target group
Productivity and resilience of tourism companies	• Boost productivity through digital tools • Tourism entrepreneurship • Stimulating business growth and professionalism • Innovation in tourism • Building and retaining human capital and digital capacity • Enhancing SME management through data • Risks of labour shortage in the hospitality sector

Source: OECD (2020a, 2020c) and own adaptations

As can be observed, some emerging trends stem from technology and environment megatrends, and more specifically new digital technologies and solutions, sustainability and environmentally friendly solutions and the diversification of tourism products. The COVID-19 pandemic has affected all the dominant trends in Europe, but the tourism supply side was already on its way to a digital and more sustainable transition.

Digitalisation and digital transformation have emerged strongly in recent years also in tourism, leading to the development of digital tourism business ecosystems. Industry 4.0 covers not only the manufacturing sector, but also other parts of the economy, including tourism. Business 4.0 aims to transform business practices and economic production through digitalisation. As tourism combines these two features, massive transformations can take place. These will focus on sales and marketing, digital business ecosystems and integrated systems (Dredge et al., 2018). Digitalisation not only brings opportunities but also poses challenges especially for tourism SMEs. This particularly regards the capabilities of human resources, access to finance and digital skills.

Country examples – Dealing with technological advances in tourism supply

Bulgaria has created the Integrated Tourist Information System, an electronic database with information on public and private stakeholders such as tour operators, accommodation providers, trade associations and others, allowing a secure platform for information exchange, data transfer, monitoring, benchmarking and better decision making.

Denmark launched the Tourism Tech Datalake project to better use technological trends, collecting data from stakeholders to develop new tourism business models. Estonia also plans to develop online information systems for all accommodation establishments to reduce bureaucracy and simplify communication.

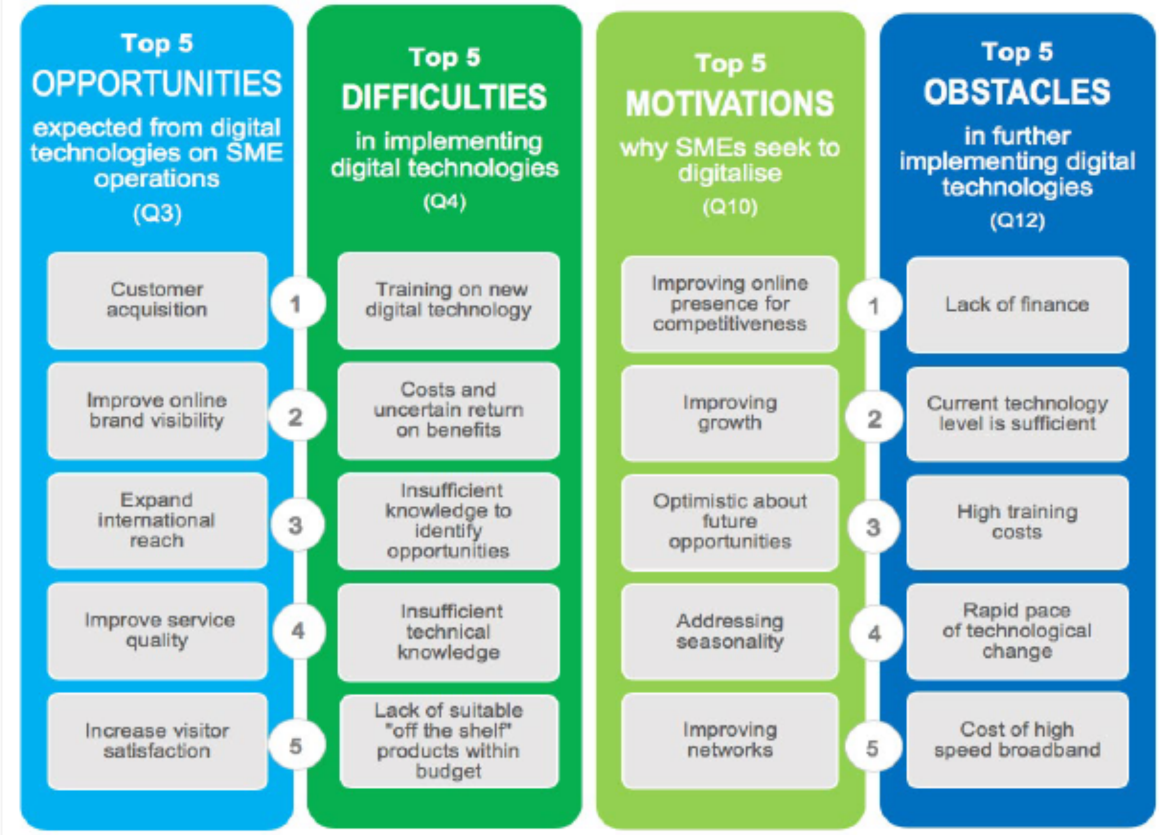
Similarly, Sweden developed a cross-agency project called 'Serverat' to support tourism businesses and their administration responsibilities by developing guidance (OECD, 2020a).

A similar example is in the Alps, where innovation and technology has offered more diverse goods, services and information access, influencing the expectations of consumers in return (OECD, 2020a).

Technology and technological developments will play a key role in the future of tourism. Information and Communication Technology has already revolutionised travel planning and marketing, from booking and payment systems to information distribution and availability, linking customers with destination businesses directly (Scott & Gössling, 2015). In addition, as by the OECD, enabling technologies and embedding technology in marketing and innovative campaigns will also use social media as a promotional tool (ECORYS et al., 2016). Technological advances also help expand the informal provision of tourism services, with formats such as Airbnb, Uber, Couchsurfing etc., as well as increased automation and robotics in service delivery (Scott & Gössling, 2015). Digitalisation will mean more diverse products, making goods, services and information more visible, as well as increasing competition among suppliers (Permanent Secretariat of the Alpine Convention, 2013).

Digitisation will play a major role in tourism over the few next years. In addition to numerous opportunities, it also comes with challenges. As shown in the figure below, these regard capacities, skills, costs and knowledge.

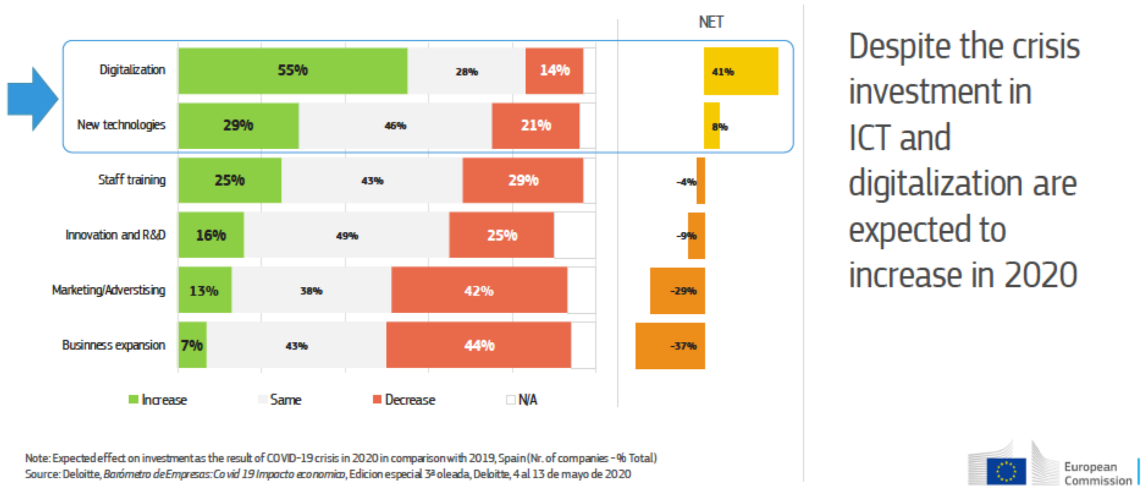
Figure 4.2 Digitalisation in Tourism: Challenges and opportunities



Source: Dredge et al. (2018, p. 3)

The COVID-19 pandemic has accelerated digitalisation. Despite the economic consequences, more investments in digitalisation are expected as depicted in Figure 4.3.

Figure 4.3 COVID-19 expected effect on investment (2019/20)



Source: Santos (2020, p. 4)

The pandemic has brought a shift in technological advances towards 'smart tourism', accelerating digital transition and highlighting climate change. Furthermore, digitalisation provides easier access to information allowing travellers to tailor their trips during the pandemic, while also offering greater flexibility for bookings (WTTC, 2020). The trend can accelerate with more investment in automated services, delivery robots, contactless technologies, etc. (WTTC, 2020). Facilitating seamless coordination through touchless technological experiences will be key. Digitalising, for instance health information, or accelerating the adoption of digital identities will reduce border control biases and delays, contributing to more seamless travel. Of course, there are cybersecurity challenges for which both governments and the tourism supply sector need to prepare (WTTC, 2020). Against this background, urban and innovation leader areas or those with high digitalisation investments may leap forward compared to rural destinations or remote places, where adopting digital solutions may be more challenging. Such digital inequality, may hamper tourist arrivals as well as investments in digital infrastructure and digital skills of the tourism supply side (WTTC, 2020).

Another emerging trend related to technological advances is virtual experiences. This trend has a medium magnitude. However it may endure so the tourism supply side must adjust further. Adapting to changing times, virtual reality experiences can inspire tourists and cultural sites have offered these to 'digital tourists' as a travel replacement (WTTC, 2020). A softer form may be the 'digital nomad' being able to work from any destination with good internet access. This type of tourism has increased during the pandemic, as it offered a pleasant alternative to the home office and increased the pressure on destinations to offer good free of cost internet connections. In parts this also goes together with more 'long-term stays'. It remains to be seen to what degree these trends continue or are just expressions of the lockdowns.

Country examples – Virtual tourism

West of England developed augmented reality and virtual reality applications in Bath and Bristol for guided tours by Roman soldiers in the Roman Baths. Malta has also developed personalised tourist information through virtual reality to be more innovative and engaging. Finland invests in developing skills for virtual services (OECD, 2020a).

Several countries have offered virtual experiences during the pandemic to engage with future tourists until travel restrictions are lifted. Switzerland, initiated the 'Dream Now, Travel Later' initiative, Ireland has the 'I will return' campaign and Portugal 'Can't Skip Hope' (WTTC, 2020). It remains to be seen whether this replaces travelling in person or functions as a trigger so people follow-up their virtual visits with in-person visits.

All the above imply an increasing need for digital skills and capacity in tourism suppliers. Investing in people's digital skills is another strong emerging trend, as the tourism supply side will need to continuously adjust. Upskilling will also be particularly necessary for places with low digital knowledge where more training is needed. Developing digital skills is also largely linked to employment, with more opportunities for employees that have them, but depriving those that lack training.

The accelerated use of online tools together with social distancing measures and restrictions reduce physical business meetings. Such a trend may be of medium magnitude but have a long-lasting effect. MICE tourism was one of the first to be impacted by the global spread of COVID-19 and could be one of the last to fully return (Aburumman, 2020). Face-to-face meetings are replaced with virtual meetings, conferences by hybrid events and incentives and training in other countries have been significantly reduced. Together with an acceleration of working from home, traditional tourism business models may be negatively impacted. Places depending on business travel and MICE tourism may need to diversify. This may be particularly relevant for urban areas across the EU with consequences for businesses regarding trust and partnership development (WTTC, 2020). Recovery is possible but maybe only in the long-term. In the post-COVID 19 age, the MICE industry could experience major changes. Regardless of the appeal of traditional events, exhibitors and organisations can use cost-effective virtual events and conferences to reach a wider audience without the need to travel. This might also reduce MICE tourism in the long run.

More visitors, large cruise ships and peaks due to seasonality strain support services, infrastructure, water and waste management. In addition, noise pollution, greenhouse gas emissions linked to transport, congestion and damage to cultural and natural sites lead to environmental degradation of tourism destinations (OECD, 2020a). Tourism is associated with a variety of environmental impacts including pressure on natural resources, pollution and physical impacts (Sunlu, 2003). A growing consciousness of the environmental impacts of tourism and increased environmental awareness is a key trend (Boluk et al., n.d.; CSES, 2013; ECORYS et al., 2016; Scott & Gössling, 2015). There is a shift towards more sustainable solutions and sustainable tourism growth, with a strong impact on the tourism supply side. There is also an obvious impact on climate change, through a lower environmental footprint.

Many solutions for more environmentally friendly tourism have already been developed, including the European tourism indicator system for sustainable destination management (ETIS) or European labels for products and services with a certified impact (EMAS and EU Ecolabel). Many tools for good environmental management in the tourism sector have been developed and wait for implementation on a larger scale (Styles et al., 2013). The tourism industry is aware of the need to become more sustainable and is urging the European Commission and national governments to take action. One example is the European aviation sector: 'The European aviation sector is committed to its efforts to reduce its negative environmental impacts, both locally and globally. The latter implies in particular for all stakeholders and all policy-makers to work together to achieve net zero CO2 emissions from all flights within and departing from the EU by 2050' (European Aviation Associations, 2020, p. 5). In addition, introducing costs for fuel and the use of natural resources, carbon emissions and biodiversity loss to ensure sustainable tourism, are emerging trends (Scott & Gössling, 2015; ECORYS et al., 2016). Mass tourism, for instance, is less sustainable than alternative tourism. This respects sustainability and appreciates nature, landscapes and cultures, is small scale and involves local people (Cooper et al., 2004). A few Member States such as Greece, Spain and Italy have made steps towards bridging tourism and sustainability. Sustainable tourism has been promoted by policies, including EU policies. Furthermore, high environmental awareness and a demand for diversified tourism products have encouraged this shift (Cooper et al., 2004).

Country examples – Sustainable tourism

Austria launched a broad stakeholder consultation to identify guidelines to make the country a sustainable destination. Ireland also has a plan to maintain sustainable growth and encourage cooperation in the supply side. Finland aims to become the most sustainable tourism destination in the Nordic region focusing on activities fostering sustainable development, responding to digital change, improving accessibility and developing an environment that supports competitiveness. Sweden runs a long-term strategy for sustainable tourism development. Latvia has developed guidelines and actions for a more integrated approach to tourism (OECD, 2020a). The Alpine Convention promotes sustainable tourism and helps tourism enterprises to evaluate, manage and reduce their environmental impact.

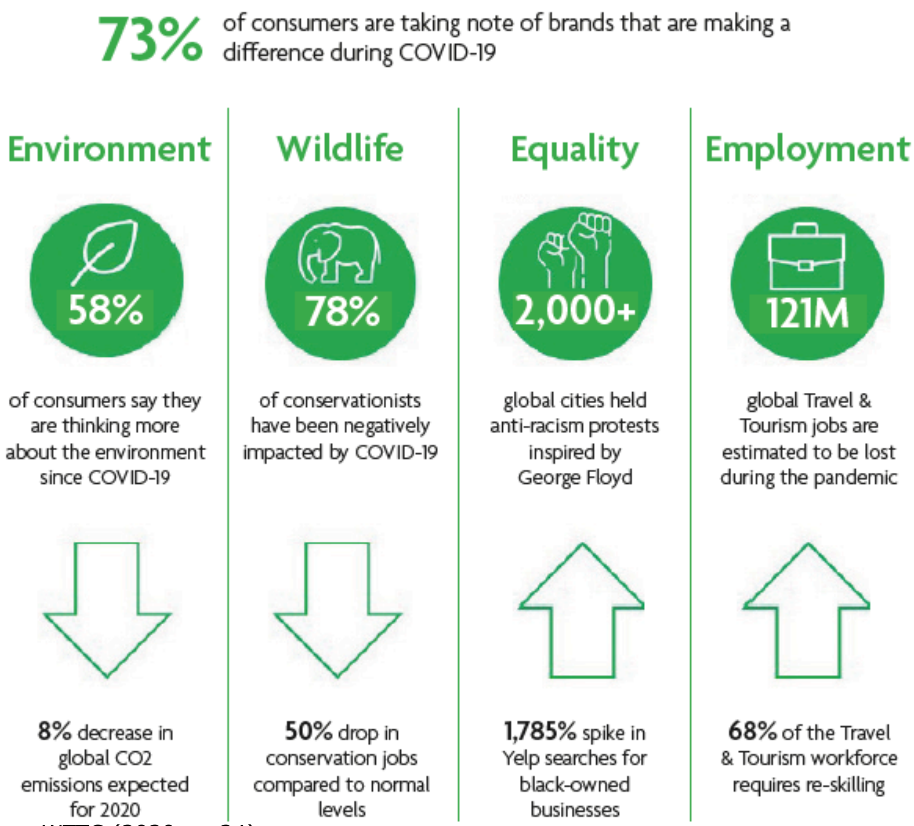
Greener and more sustainable tourism has been accelerated by COVID-19. This shift towards more fair and sustainable solutions is more visible during the pandemic, as figure 4-5 shows. Tourists have become more aware of climate change effects and the effect of tourism on the environment. They are adjusting their choices towards more eco-friendly solutions, alternative transport modes and fairer and smarter destinations, tending to prefer more sustainable destinations, and supporting more eco-friendly choices (Santos et al., 2020).

The promotion of eco-destinations will become more popular, so places rich in biodiversity and natural habitats may see a positive effect. In addition engaging the tourism supply side with local communities will increase fairness and sustainable living (WTTC, 2020), building on the cultural heritage and authenticity of places.

The tourism sector supplies a wide variety of products. The COVID-19 pandemic has transformed the way of thinking about tourism and has highlighted the need to develop more diversified economies and stronger local supply chains by exposing the dependency of many local areas on tourism (European Travel Commission, 2020).

Accelerating digitalisation, remote working tools and rethinking business meetings are a few examples of 'new' tourism business models (Santos et al., 2020). The pandemic has also put more attention on tourism products related to well-being.

Figure 4.4 Consumers noting brands that make a difference



Source: WTTC (2020, p. 24)

When these trends will peak, slow down or accelerate is to be seen. In this chapter the emphasis is on trends influenced by the pandemic. Beyond these are other trends, overarching or not, and developments where COVID-19 has an indirect or limited influence such as ageing, geopolitical tensions and terrorism.

Looking at different trends and their impacts helps build places that can better respond to external shocks when they happen with minimal negative consequences. At the same time, looking at trends and planning early on to address their impacts helps build more robust regions ready to confront external shocks before they become reality.

4.3 Tourism trends in space and time

The above trends come with different time horizons and play out differently in different types of regions. While digitalisation trends are here to stay, increasing shares of domestic tourist are expected to play a role for some years but fade in the long-term.

A general appreciation of which trends play a role when and where was collected through an online survey in spring 2021 (see textbox).

Online survey on tourism trends

Between 01 February and 15 March 2021, 232 people shared their insights on tourism trends via the online survey. Insights from a variety of players in the field of tourism have been collected. Insights can be differentiated by type of organisation, the focus of the organisation and predominant type of tourism addressed by the respondent.

- **Type of organisation.** 22% of the insights are from tourism businesses, 13% from organisations managing, coordinating or promoting tourism destinations, 37% from public authorities (i.e. 28% local and regional and 9% national authorities), 12% from university or research organisation. The remaining respondents represent civil society organisations, tourism service providers or other types of organisation.
- **Part of the ecosystem.** Most respondents work with destination management or tourism governance and policy (43%). 20% work in hospitality, including hotels and accommodation, restaurants, cafés and catering. 22% work with no specific part of the tourism ecosystem. The remaining respondents work for example as tourism operators, events and entertainment, research and analysis.
- **Country of organisation.** Insights have been collected from almost all European countries and even from non-EU Member States. Most responses were from Spain, Austria and Greece.
- **Type of tourism.** Respondents typically cover multiple types of tourism in their work, but most frequently nature, active and rural tourism (60%). 36% work with city trips and 35% with summer activities.

4.3.1 Temporary trends – COVID-19 restrictions and uncertainties

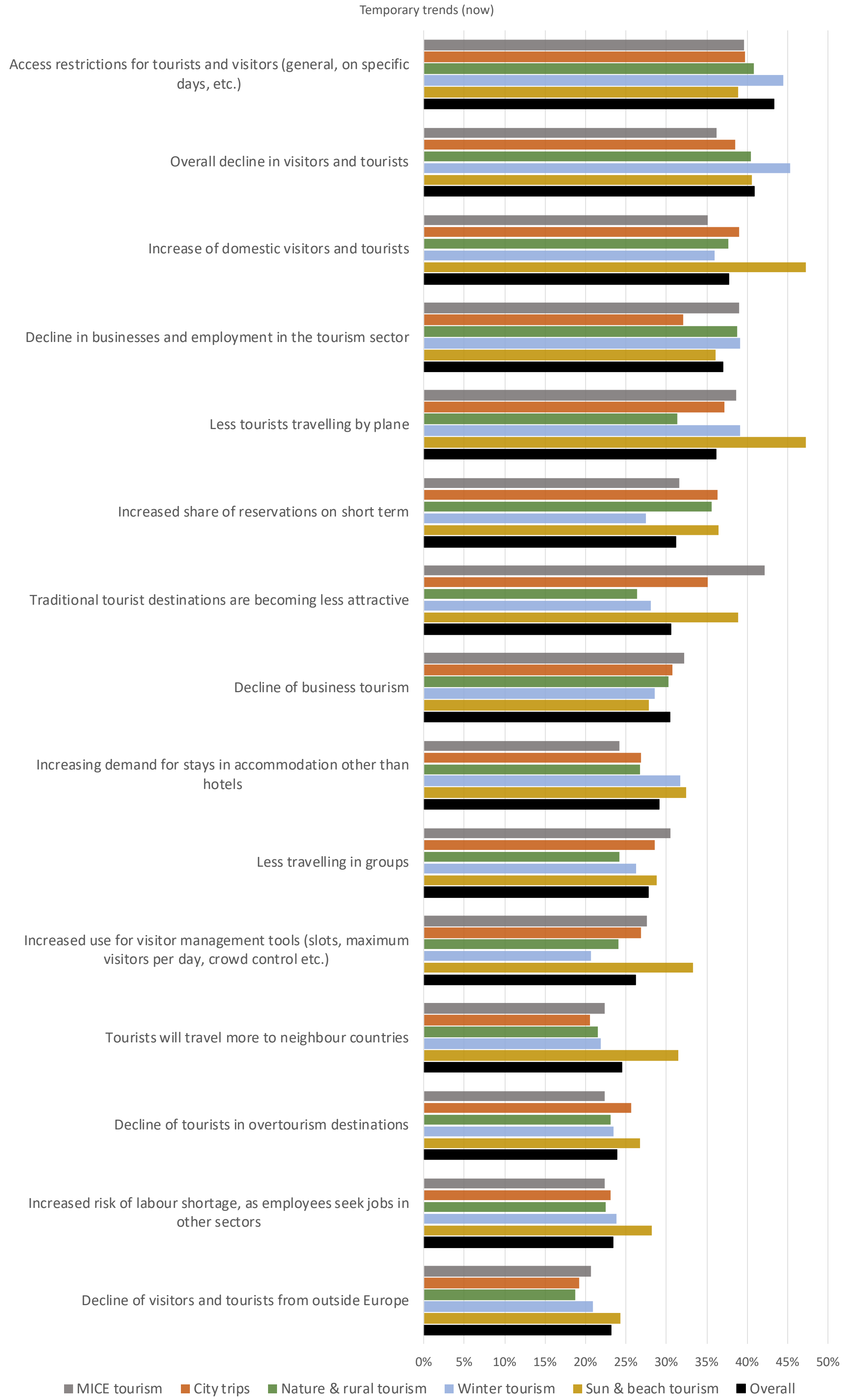
Several trends are relevant but will have only temporary effects (see Figure 4.5) as they relate to the restrictions and uncertainties due to the pandemic. The top 5 temporary trends are:

- **Access restrictions for tourists and visitors.** In many places access to sites and events is restricted. While access restrictions currently play an important role, this trend is expected to decline and have little importance in the long-term. Still, it is not expected to disappear completely over the next 10 years. In winter tourism areas this trend was considered highly important in the winter season 20/21, while in the short-term mainly sun & beach, city and MICE tourism areas expect this trend to play a role.
- **Decline in visitors and tourists.** In 2020 most tourist areas saw a heavy decline in visitors and in 2021 visitor numbers are expected to be modest in many areas. This trend is expected to become even more important over the next 2-4 years but fade in the long-term. The survey ran during the winter tourist season in February and March, highlighting winter tourism areas. In 2-4 years all types of tourist areas and in particular MICE and city tourism are expected to see a decline.
- **Increased domestic tourism.** In the wake of travel restrictions and uncertainties brought by the pandemic, domestic tourism has increased in many areas. This is seen as a temporary trend, with declining importance in the short and long-term. Still, it is not expected to disappear even in a 10-year perspective. Temporarily this trend is considered strongest in the sun and beach areas, while in the short-term city trips and rural areas have benefitted.
- **Decline in tourism businesses and employment.** Following declining visitor numbers business opportunities and employment in the tourism sector are also expected to decline temporarily and especially in a 2-4 year perspective. However, in the long-term the trend is not expected to play a major role and is expected to play out similarly across all types of tourist regions.
- **Fewer tourists travelling by plane.** Tourism businesses and respondents working with sun and beach tourism especially see this as temporary effect easing in the short-term but staying to some extent even in the long-term.

For MICE tourism the expectation is that traditional destinations will be less attractive in the immediate future. To some degree this also concerns sun & beach tourism.

Other temporary trends include short-term trend bookings, less business travel, increasing demand for accommodation other than hotels, less travelling in groups, more use of visitor management tools, increased travel to neighbouring countries, less overtourism, labour shortage in the tourism sector and fewer non-European tourists.

Figure 4.5 Temporary tourism trends (spring 2021)



Source: Spatial Foresight, 2021 based on survey findings (n=224)

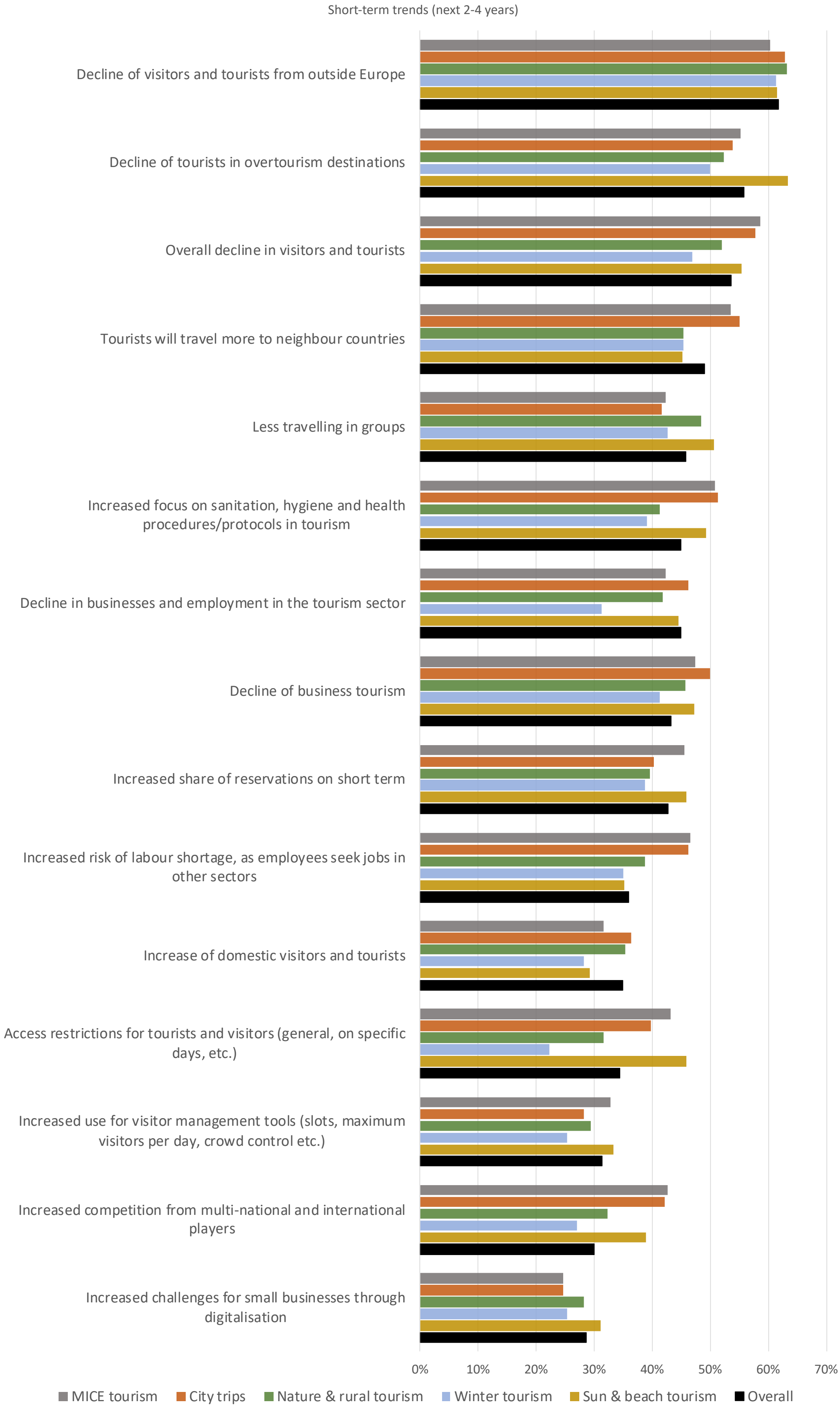
4.3.2 Short-term trends – behavioural changes

Trends shaping the 2-4 year perspective of the tourism sector differ somewhat from the temporary trends (see Figure 4.6). Short-term trends reflect to a large degree behavioural changes brought about by the COVID-19 pandemic. The top 5 are:

- **Decline of non-European tourists.** In the wake of the pandemic travel restrictions affected non-European visitors in particular. Increasingly it is not official restrictions but rather behavioural changes that are shaping travel patterns. In this context a decline of non-European tourists is expect for the next 2-4 years. This trend will however fade in the long-term. The trend concerns all types of tourist destinations, though earlier analysis has shown that the share of non-European tourists varies substantially between places (see Map 2.5).
- **Decline in overtourism.** During the pandemic many areas with overtourism in the recent past experienced a respite. The decline is expected to be short-term, over the next 2-4 years, but then increasing in the next 5-10 years. In particular sun and beach destinations are expected to see less overtourism short term.
- **Overall decline in visitors and tourists.** As pointed out in the section on temporary trends, the decline in visitors and tourists is a temporary trend, which is more important over the next 2-4 years but should vanish in the long-term.
- **Tourism to neighbouring countries.** While there is a temporary increase in domestic tourism, the short-term trend points at an increasing preference for trips to neighbouring countries. This is expected to be stronger in the short-term and lose importance in the long-term, especially for city trips and MICE tourism.
- **Less traveling in groups.** Tourism might become more individual in the short term, with fewer group tours. This currently temporary trend is expected to grow stronger in the short-term and decline in the long-term – though it will still linger over the next 10 years. This trend is expected to be particularly strong in sun and beach areas as well as nature and rural areas.

Other short-term trends include increased focus on hygiene and health procedures, less employment in tourism, fewer visitors and tourists, short-term bookings, labour shortages in the tourism sector, domestic tourism, access restrictions for visitors and tourists, visitor management tools, growing competition from international players, and increased challenges for small businesses through digitalisation.

Figure 4.6 Short-term tourism trends



Source: Spatial Foresight, 2021 based on survey findings (n=224)

4.3.3 Long-term trends – digitalisation and eco-friendly tourism

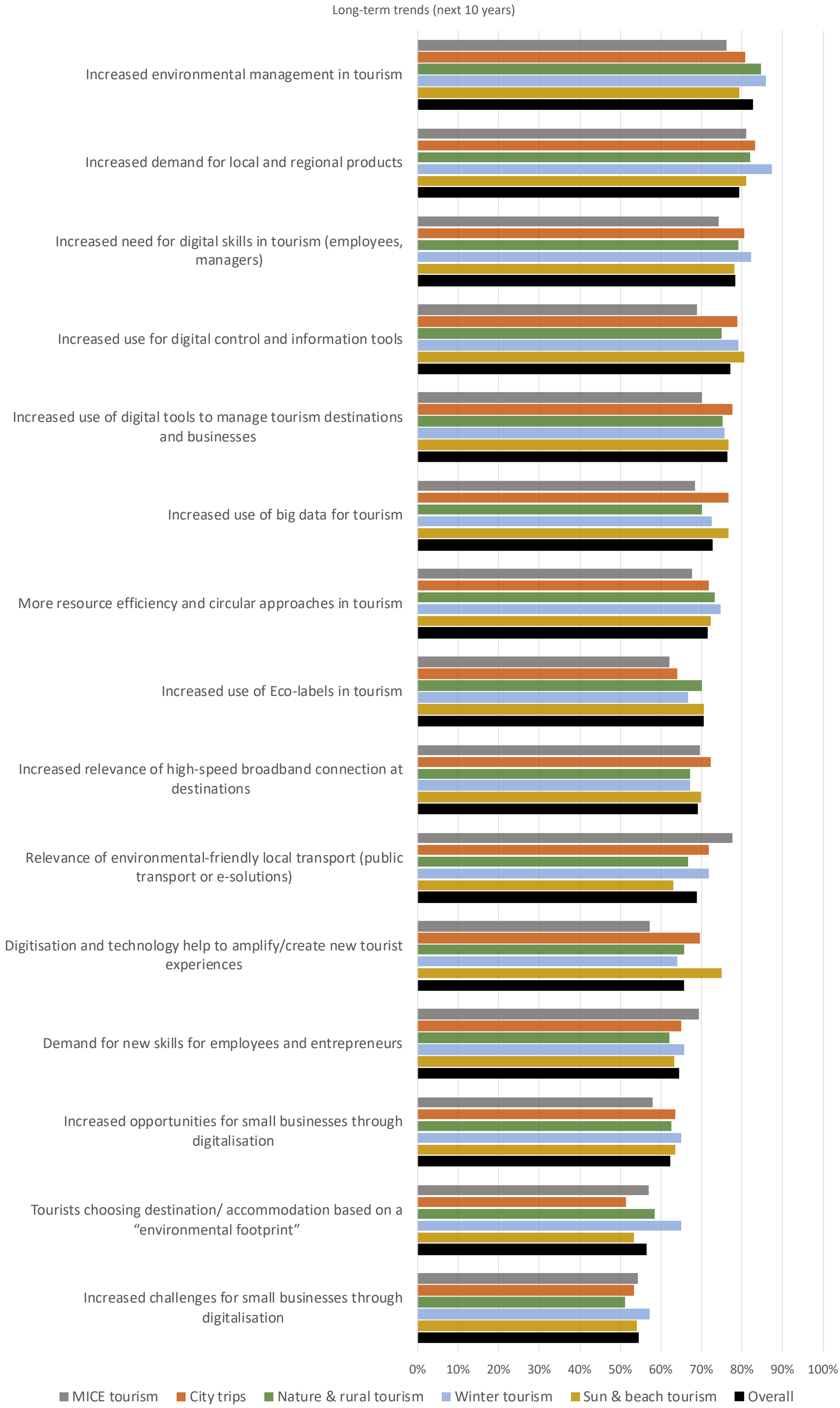
Long-term trends for the next 10 years are less influenced by the pandemic, but highlight an increasing focus on digitalisation and eco-friendly tourism. The top 5 are:

- **Increased environmental management.** Europe's green transition will also affect the tourism sector and encourage increased environmental management in tourism. Over the next 10 years, this is expected to be a growing trend in all kinds of tourist destinations.
- **Increased demand for local and regional products.** Linked to the push for more sustainable tourism and more genuine, place-based, visitor experiences, comes a growing demand for local and regional products. While this trend is considered important in all types of tourist destinations, it seems to be particularly important for winter tourism areas.
- **Increased need for digital skills.** Europe's digital transition will also affect the tourism sector. This fuels a trend for increasing digital skills for all in the tourism sector over the next 10 years.
- **Increased use of digital control and information tools.** Digitalisation will mean an increased use of digital tools to control and inform visitors and tourists.
- **Increased use of digital tools to manage tourist destinations and businesses.** Along the same lines is the use of digital tools to manage tourist destinations and businesses, this is expected to grow over the next 10 years.

For most of the long-term trends, differences between types of destinations are not expected to be substantial, though MICE tourisms will follow a slightly different path. Among others environmentally friendly local transport (e.g. public transport or e-solutions) is expected to be more important.

Other long-term trends for tourism include the increasing use of big data, more resource efficiency and circular approaches, growing importance of eco-labels, increasing importance of high-speed broadband connection at destinations, digitalisation and technology to amplify/create new tourist experiences, new skills for employees and entrepreneurs, increased opportunities for small businesses through digitalisation, tourists choosing destination/accommodation based on an 'environmental footprint' and increased challenges for small businesses through digitalisation.

Figure 4.7 Long-term tourism trends



Source: Spatial Foresight, 2021 based on survey findings (n=224)

4.3.4 Trend lines

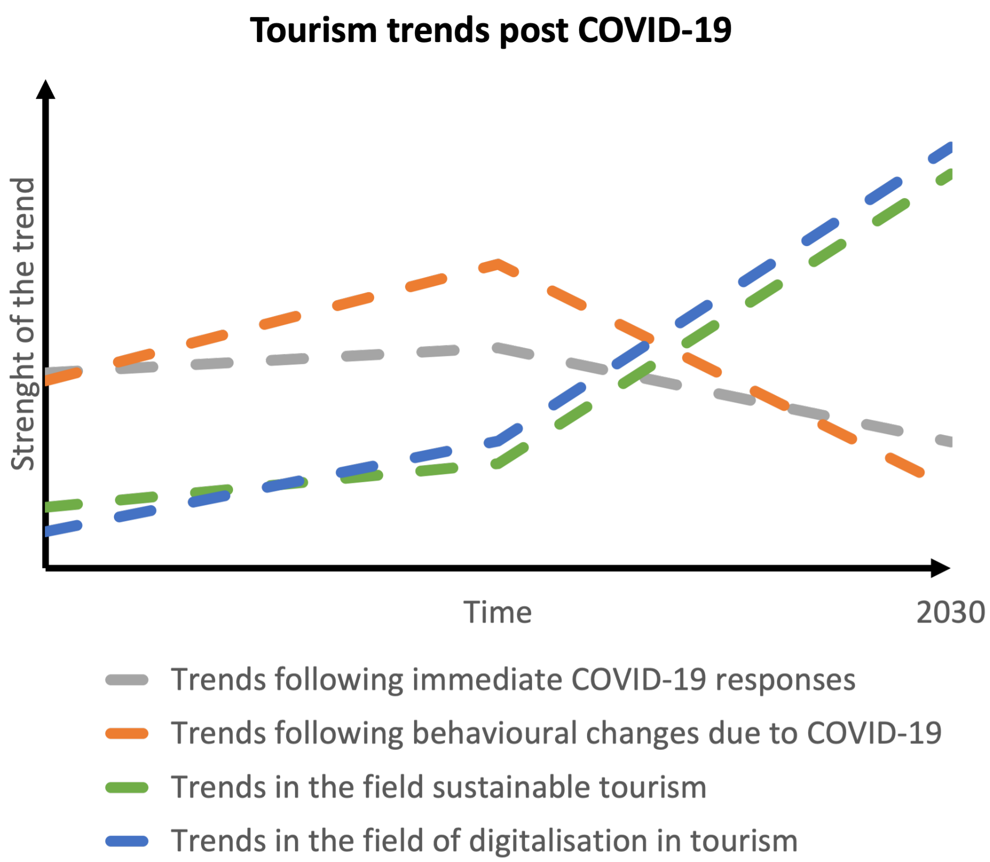
As shown above, trends in tourism are expected to shift over the next decade from temporary trends responding to COVID-19 restrictions and uncertainties to short-term trends reflecting expected behavioural change in the wake of the pandemic to long-term trends focusing on digitalisation and eco-friendly tourism (see Figure 4.8).

Taken together this implies the trends highlighted above will evolve differently over the next decade. Some trends are temporary and will be less important in the coming years. These are mainly trends directly related to the pandemic uncertainties, anxieties and restrictions. Examples are access restrictions for visitors and tourists, more domestic tourism, fewer tourists travelling by plane, and traditional tourist destinations becoming less attractive.

Other trends will increase over the next 2-4 years, peak in the short-term and decline in the long run. These are mainly trends linked to behaviour change in the wake of the pandemic. Examples are declining shares of non-European tourists, less overtourism, fewer visitors and tourists, more trips to neighbouring countries and less group travel.

Trends on sustainable tourism and digitisation are on the rise and will increase in importance over the next 10 years. Among these are the top-5 long-term trends outlined above: increased environmental management in tourism, increased demand for local and regional products, increased need for digital skills in tourism, increased use for digital control and info tools, and increased use of digital tools to manage tourist destinations and businesses.

Figure 4.8 Evolution of tourism trends over the next 10 years



Source: Spatial Foresight, 2021 based on survey findings (n=224)

4.4 Towards a geography of tourism trends

The various tourism trends discussed above play out differently in different types of tourism destinations. To stimulate further debate about the territorial diversity of key trends shaping the tourism industry in the years to come, Map 4.1 brings together a geographic approximation of types of tourism regions (see section 2.6) and some of the trends discussed above.

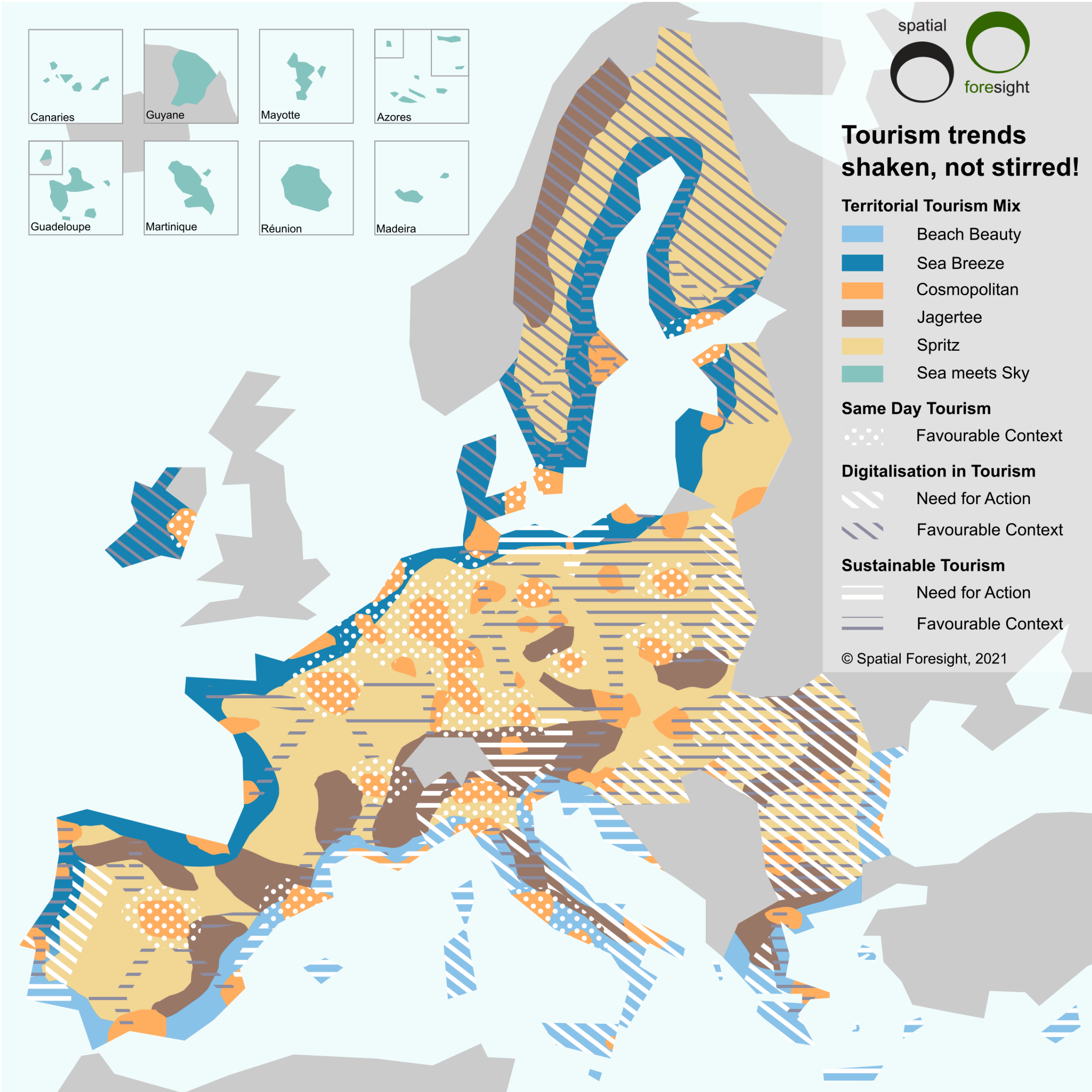
Areas favourably positioned for growing numbers of same-day tourism are mainly the main metropolitan areas and their wider catchment areas in Europe. That comprises both same-day tourists coming to the metropolitan area, as well as those living in the metropolitan area and going to the surrounding countryside.

As for more sustainable and eco-friendly tourism, along the main highspeed railway lines and night train connections in Europe will allow environmentally friendly travel to the destination. Furthermore, areas with a low ratio of tourists per capita can attract more sustainable tourism. This includes large parts of Poland, Hungary, Romania and Bulgaria. On the other hand, areas with a high ratio of tourists per capita face challenges in terms of their carrying capacity. This implies that they need to take dedicated actions to adjust their offers and shift their tourism ecosystems towards sustainable tourism, beyond green labelling. This includes large parts of the Portuguese coast, Mediterranean destinations in Spain and France, costal Croatia, many Greek islands and Cyprus.

Digitalisation encourages tourism, especially where there is frequent use of digital communication by public authorities and retailers. This includes large parts of the Baltic Sea Region and Ireland. In destinations using digital means less, more action is needed especially in parts of Portugal, the Balearic Islands, large parts of Italy, Hungary, Romania, Bulgaria and some parts of Greece. Alternatively, these destinations might also serve niche markets focusing on digital detox and being offline as the new luxury.

Combining geographical approximations of types of tourism region and major trends, may also help to develop more place-sensitive policy responses.

Map 4.1 Tourism trends shaken, not stirred



Source: own elaboration

5 Policy initiatives to promote sustainable tourism

This section presents the results of the assessment of policy initiatives to strengthen tourism in Europe. First, is the context for EU support policies for tourism. After that is the assessment of national, regional and local policy initiatives. Finally, the potential role of tourism policy initiatives in the upcoming 2021-2027 funding period for long-term recovery and resilience plans is discussed.

5.1 EU support for tourism

In 2010, the European Commission's Communication 'Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe' established an action plan for EU tourism with four priorities to: i) stimulate competitiveness in the European tourism sector, ii) promote sustainable, responsible, and high-quality tourism, iii) consolidate Europe's image as a collection of sustainable, high-quality destinations, and iv) maximise the potential of EU financial policies for developing tourism. These goals are still valid today and go hand in hand with the aim to keep larger parts of tourism value chain in destinations to ensure the economic benefits stay there. Furthermore, the Council of the EU, the European Parliament and other tourism stakeholders urge the Commission to work on a strategy for the transition to sustainable, responsible and smart tourism, in the light of challenges such as climate change and the pandemic (Council of the European Union, 2021; European Parliament, 2020).

Several stakeholder organisations and sector associations have formulated how the recovery of tourism should contribute to larger challenges and to long-term goals. The network of regions NECSTouR proposed a vision for the future European Agenda for Tourism 2050 to lead destinations towards a responsible recovery from the impacts of the coronavirus pandemic by achieving smart and sustainable growth, addressing the challenges of climate change and improving resource efficiency, embracing digitalisation, boosting skills, delivering market intelligence and emphasising the great potential of tourism to achieve the UN Sustainable Development Goals (NECSTouR, 2020b). An alliance of more than 60 European public and private organisations, covering the whole tourism value chain presented the 'Tourism Manifesto' in February 2021, helping to draft national recovery & resilience plans with reforms and investment proposals related to travel and tourism (Tourism Manifesto Alliance, 2021).

In October 2020, the European Tourism Convention developed and endorsed action points to seize the opportunities of data-driven development. The recommendations highlighted European strategy on data, digitalisation of tourism, and working towards common stakeholder agreements on data sharing.

The recent Council conclusions on Tourism presented in May 2021 take into account the wide-ranging effects of the pandemic on tourism and encourage Member States to 'develop sustainable, responsible and resilient tourism policies and strategies', in particular:

a) driving towards sustainable and responsible tourism and business conduct;

b) improving connectivity and multi-modal sustainable travel in cross-border, rural, insular, peripheral and depopulated areas, as well as outermost regions;

c) promoting sustainable coastal and maritime tourism as part of the tourism ecosystem and the blue economy;

d) promoting new technologies, digitalisation, ICT and data-sharing to enhance the performance of tourism businesses, improve tourism development planning and the smart management of tourism flows, as well as provide seamless travel, easier communication and integrated tourism development;

e) encouraging European wide dialogue and exchange of best practice to develop innovative approaches, including in smart tourism, for the balanced management of growing tourism flows into European destinations (Council of the European Union, 2021).

In line with these conclusions, in June 2021 the European Commission proposed scenarios towards the transition of EU tourism by 2030. These are open for stakeholder consultation until September 2021. Proposals envisage measures addressing the Commission, Member States, regional authorities and destinations to develop an EU tourism ecosystem for 2030 that is more competitive, resilient, sustainable and smarter (European Commission, 2021d).

At EU level, the main instruments to boost tourism have been EU Cohesion Policy funds, together with programmes such as COSME and LIFE. Traditionally, many funds were dedicated to conventional support for tourism via public infrastructure, public information systems/measures, promotion activities and vocational training as well as SME support.

In 2014-2020, some activities were already very innovative and targeting sustainable tourism, quality, governance and strategic cooperation, use of technology and IT or new tourism products and business models. Interreg projects were very important to stimulate transnational and cross-border tourism (Nigohosyan et al., 2020).

Facing the new funding period 2021-2027, EU Cohesion Policy funds again present an important opportunity for investments, support schemes and transition measures in the tourism ecosystem.

Managing authorities at national and regional levels need to be aware of the needs and opportunities of the tourism value chain. Tourism stakeholders and ecosystems may also require horizontal actions that go beyond the traditional support for industrial sectors or SMEs. National and regional support programmes need to consider different needs of different types of tourism regions. A challenge will also be to exploit synergies with other EU programmes such as Horizon Europe, Digital Europe, Next Generation EU, New European Bauhaus Initiative, European Enterprise Network, Digital Innovation Hubs, LIFE+, ERASMUS+ etc.

The national Recovery and Resilience Plans are an additional instrument to stimulate recovery in the tourism industry, among others. This instrument is especially important for countries that have been hit hard by the pandemic. The question is how far these funds can be channelled towards the tourism ecosystem and to regional and local players, namely destination management organisations.

In addition to EU Cohesion Policy and EU Programmes, specific EU initiatives stimulate European tourism and make destinations more sustainable:

- The EU initiative to reward innovative and smart tourism in European Cities 'European Capital of Smart Tourism'[10];
- The Virtual Tourism Observatory[11] helps policy makers and businesses develop better strategies for a more competitive European tourism sector;
- The European Destinations of Excellence (EDEN) competition to promote sustainable tourism and emerging destinations;
- DG GROW's '*Guide on EU funding for the tourism sector (2014-2020)*' (2016)[12];
- Studies such as the '*Study on specific challenges for a sustainable development of coastal and maritime tourism in Europe*' (2016);
- The EU Tourism Business Portal (DG GROW)[13] with information and advice for SMEs in the tourism industry;
- Policy initiatives to improve professional skills in the tourism sector, such as the '*Blueprint for Sectoral Cooperation on Skills in Tourism*'[14] or ERASMUS+;

[10] https://smarttourismcapital.eu/ Goteborg and Malaga were the European Capitals of Smart Tourism in 2020.
[11] https://ec.europa.eu/growth/tools-databases/vto/
[12] https://op.europa.eu/en/publication-detail/-/publication/e0707433-aa5f-11e6-aab7-01aa75ed71a1
[13] https://ec.europa.eu/growth/sectors/tourism/business-portal_en
[14] https://nexttourismgeneration.eu/

- DG GROW's European Tourism Indicators System (ETIS). ETIS is a system of indicators suitable for managing the sustainability of tourist destinations. 86 destinations participated in two calls for pilot actions between 2013 and 2016.
- Between 2011 and 2015, DG GROW supported transnational thematic tourism products in Europe, e.g. European cycling tourism with the EuroVelo platform[15]. In 2019/2020, five new projects[16] were supported by DG GROW to boost sustainable tourism development and the capacity of tourism SMEs through transnational cooperation and knowledge transfer;
- Digital Innovation Hubs (DIH) have been promoted under Horizon 2020. They will be supported under Digital Europe in 2021-2027, looking for synergies with the new Smart Specialization Strategies and with ERDF programmes and projects. Specific tourism and travel DIHs have already been created in Spain (DIH-BAITUR: Digital Innovation Hub of the Balearic Islands for Artificial Intelligence, Tourism and Agriculture) and Czechia (Digital Travel Industry Innovation Hub - DIH Tourism 4.0);
- The thematic area '*Digitalisation and Safety for Tourism*' within the Industrial Modernisation S3 Thematic Platform with the envisaged Tourism of Tomorrow (ToT) Lab[17].

5.2 National and regional policy initiatives to support tourism

In addition to the EU programmes, many EU Member States and regions in recent years defined specific strategies and action plans to support the tourism ecosystem and to promote specific factors of competitiveness such as innovation, digitisation, sustainability, accessibility and quality.

With the following differentiation is important concerning initiatives:

- launched prior to the pandemic, to strengthen and revitalise tourism in an area.
- launched during the pandemic to cushion immediate challenges for the tourism sector (e.g. covering fixed costs, furlough schemes, hotel vouchers for citizens).
- to support the recovery from the pandemic with a medium- to long-term perspective to strengthen the tourism sector.

For this study initiatives of the first and the last type are of interest.

89 policy initiatives to promote sustainable and resilient tourism have been identified during this study. They are a mix of national, regional, and local initiatives. Initiatives under Recovery and Resilience Plans are also considered as well as transnational and cross-border measures[18].

The initiatives cover different areas but most are dedicated to 'Destination Management and Governance', 'Business/SME Support' and to more and better 'Partnerships'.

24 initiatives directly relate to the COVID-19 pandemic and were defined in 2020 or later – these focus on short-term response to direct COVID-19 effects. 65 policy initiatives are not or only partially related to COVID-19. They have a medium- or long-term focus on relevant future trends or challenges in tourism.

15 https://en.eurovelo.com/
16 https://ec.europa.eu/growth/sectors/tourism/offer/sustainable/transnational-products_en
17 https://s3platform.jrc.ec.europa.eu/tourism
18 This is only a small selection of initiatives in Europe. The analysis was conducted from October 2020 until May 2021. There are many other , regional or national initiatives for destinations and new initiatives emerge all the time. For example, those in the good practice catalogue of NECSTouR: https://necstour.eu/index.php/goodpractice

Table 5.1 Overview of policy initiatives

Area of Intervention	National	Regional	Local/ Destination	From RRP Drafts*	Trans-national or cross-border	Other
Destination Management and Governance	9	14	5	-	5	-
Business Support, SMEs and Entrepreneurship	7	4	2	-	1	-
Partnerships	5	2	2	-	3	1
Research, Innovation and Technology	-	5	-	-	3	1
Infrastructure	-	1	4	-	-	-
Regulation, taxes or other legal instruments	2	2	-	-	-	-
Skills and Talent	-	3	-	-	1	-
Combined actions	1	-	-	5	-	-
Other	-	-	1	-	-	-
TOTAL	**24**	**31**	**14**	**5**	**13**	**2**

*RRP = Recovery and Resilience Plans

Most policy initiatives are horizontal and address aspects that could be relevant for any type of tourism region. Some policy initiatives, however, can be linked to the different types of tourism regions defined in earlier phases of the study (see section 2.6). Some initiatives target a specific type of tourism region, for example, to make tourism more sustainable for destinations that suffer from overtourism usually target 'Sea Breeze' or 'Beach Beauty' regions. Measures to promote eco-destinations or a sustainable and responsible rural tourism seem to be more suited for 'Jagertee' or 'Spritz' destinations.

Table 5.2 Policy initiatives according to tourism region type

Type of Tourism Region	COVID-19-related	No link/indirect link to COVID-19
Relevant for all types	16	22
Beach Beauty	2	13
Sea Breeze	4	19
Jagertee	2	7
Spritz	4	22
Sea meets Sky	3	3
Cosmopolitan	1	16

NOTE: Initiatives can address various region types.

Policy initiatives target different tourism-related challenges and long-term trends. This is particularly true for initiatives not linked to direct measures in response to the COVID-19 crisis. Digitisation, less negative environmental effects and improving the quality and effectiveness of tourism destinations are key challenges addressed.

Table 5.3 Policy initiatives addressing long-term trends and challenges

Long-term trend or challenge in tourism	COVID-19-related	No link/indirect link to COVID-19
Digitisation	2	13
Less Carbon	-	5
Safe and seamless	4	2
Circular Economy	-	2
COVID-Health	8	-
Environmental Effects	-	19
Quality and Effectiveness	2	16
Accessibility	-	3
Various	8	5

NOTE: Initiatives can contribute to various challenges.

In the online survey of early 2021 (see section 4.3) a majority of tourism stakeholders indicated that many policy initiatives were already in place to make tourism regions more resilient and competitive. Respondents referred mostly to initiatives on digitalisation and strengthening partnerships, followed by initiatives to improve coordination between players at local, regional and national levels as well as initiatives to promote research and innovation. Less mentioned were initiatives to promote circular approaches and reduce the use of resources. For the future, stakeholders hope for more policy initiatives promoting research and innovation and the use of technology in tourism, as well as business and SME support schemes and more programmes to support digitalisation in tourism.

65% of respondents indicated regional authorities responsible for implementation of these programmes as possible players to initiate or implement policy initiatives. In many cases these would be in cooperation with organisations managing tourism destinations. Interestingly, other players are also seen as important to implement effective policy initiatives, including tourism businesses, local governments, national authorities and civil society organisations.

5.3 In-depth analysis of national and regional policy initiatives to support tourism

Of the 89 policy initiatives, 16 cases were selected based on criteria to ensure balance and representativeness across Europe. 10 of the 16 cases were analysed more in-depth and the detailed case study reports are included in an annex to this study.

The final selection covered different areas of interventions as well as important challenges and trends for future tourism development. Different countries and types of regions were represented. The cases address diverse governance levels and specific tourism sectors, some also target the whole tourism value chain. The selected policy initiatives are presented below.

Table 5.4 Overview of analysed policy initiatives

Policy Initiatives	Challenges	Area of Intervention
Circular Hotels Project, Spain	Environmental Effects Circular Economy	Partnerships
EcoBnB Platform	Environmental Effects Less Carbon Circular Economy	Partnerships

Policy Initiatives	Challenges	Area of Intervention
Tourism Innovation Centre NEST, Portugal	Quality and Effectiveness Digitisation	Business Support, SMEs and Entrepreneurship
Smart Tourism Destination Varna, Bulgaria	Digitisation Quality and Effectiveness Safe and seamless Environmental Effects	Research, Innovation and Technology
Climate-friendly holidays in the Eifel, Germany	Environmental Effects Less Carbon Safe and seamless	Destination Management and Governance
Cycling tourism on EuroVelo Routes	Environmental Effects Less Carbon Safe and seamless	Partnerships
Grant Scheme for Storytelling, Ireland	Quality and Effectiveness Digitisation	Business Support, SMEs and Entrepreneurship
Online Academy Dachstein, Austria	Quality and Effectiveness Digitisation	Skills and Talent
Sustainable Cruise Infrastructure, Estonia	Environmental Effects Circular Economy Safe and seamless	Infrastructure
Tourism in RIS3, Crete	Environmental Effects Less Carbon Digitisation Quality and Effectiveness Safe and seamless Circular Economy Seasonality	Research, Innovation and Technology
Smart Tourism Network, Croatia	Digitisation Quality and Effectiveness	Partnerships
Eco-destinations, Romania	Environmental Effects Less Carbon Digitisation Safe and seamless	Destination Management and Governance
MOVITUR e-mobility in Mallorca, Spain	Less Carbon Digitisation Safe and seamless	Partnerships
Tourism in sustainable regional planning, Sardinia	Environmental Effects Less Carbon	Destination Management and Governance
Health and medical Tourism, Finland	Quality and Effectiveness Safe and seamless	Partnerships
ASSL training schemes, Sweden	Quality and Effectiveness Digitisation	Skills and Talent

The map below shows the geographical distribution of cases in Europe.

Map 5-1 Case Studies of Policy Initiatives

Source: Own elaboration

All cases are presented in more detail in an Annex.

Analysis of the policy initiatives has enabled the following conclusions:

Sustainable tourism is at the centre of many initiatives and there are many ways to promote sustainable and responsible tourism models. Most refer to reducing the environmental effects of tourism-related activities or increasing the social and economic return on local communities. This can be done in numerous ways, some initiatives promote carbon-free local travel, others the use of local food and beverages, some regions go for circular and resource-efficient approaches, while others promote accommodation with eco-labels and a certified reduced effect on the environment.

Case Study: Ecodestinations label, Romania

The ecotourism destination is an innovative concept for development in regions in or close to protected areas like national parks, nature parks or Nature-2000 sites. In these destinations, local communities are supported to develop family tourism businesses. A positive feature of ecotourism approaches is that the local economic impact is significantly higher than the average for classic tourism. In Romania, the Ecotourism Certification System was developed by the Association of Ecotourism in Romania (AER). The Ecotourism Certification System was developed by AER in the context of an EU project back in 2009 called "ECODESTINET – A network for the Development a European Quality Label for Ecotourism Destinations. The label helps as a guide and a marketing tool for small ecotourism initiatives (accommodation and tour operators). It helps to establish and ensure quality for the ecotourism services, contributes to nature conservation and leads to sustainable local development. Ecotourism is a valuable tool in rural areas as it supports local administrations of protected areas to develop low impact tourism, and offers a platform for common activities between the business sector and nature conservation entities.

Case Study: MOVITUR e-mobility in a tourism destination, Spain

MOVITUR was a pioneering project funded in 2015 by the Spanish Ministry of Industry, Tourism and Trade to design a comprehensive plan for the deployment of electric mobility on the island of Mallorca. The project foresaw a network of fast-charging electric stations installed by ENDESA, a Spanish electricity company. At least 8 car rental companies in Mallorca were involved and acquired electric vehicles. This was an opportunity for the transition in local/regional transport through innovation in tourism, allowing a WIN-WIN scenario for visitors, residents, producers, car rentals and the destination. As a result of the project, car rental companies now have a varied fleet of electric vehicles to offer, a clear commitment to electric mobility with a zero-carbon footprint and advances territorial sustainability. In addition, within the context of an ERDF funded follow-up project, the Government of the Balearic Islands together with numerous municipalities set up a management system for electric vehicle charging that includes a map of all charging points integrated in the MELIB system (Electric Mobility in the Balearic Islands) and a mobile application.

Sustainable tourism and digitisation initiatives do not exclude each other. Rather, they go hand in hand, with new technologies or digital tools used as instruments to monitor, register or promote environmental or social effects.

Case Study: EcoBnB platform, Italy, Austria, Switzerland, Germany, Slovenia and Serbia

The EcoBnB green accommodation website is a spin-off of the EU project EcoDots. EcoDots and the EcoBnB Platform connect travellers, small and micro enterprises in the hospitality sector, local communities and itineraries sharing a close link to sustainable and quality tourism. The project brought together a European network of eco-friendly independent accommodation and itineraries in Italy, Austria, Switzerland, Germany, Slovenia and Serbia. Thanks to web and mobile applications, travellers can discover and book eco-sustainable accommodation all around Europe. At the same time, local sub-networks of entities already practicing responsible ecotourism can leverage interconnections, ideas and visibility of the EcoBnB website www.ecobnb.com.

The project successfully brought together three important initiatives and elements for EcoBnB: market recognition (with the Viaggi Verdi logo), along with standards, community and itineraries for sustainable accommodation owners to get recognition and certification (TourCert initiative) and web architecture (former e-Turist initiative). The continuity of EcoBnB is also due to its partners finding new sources of funding after the end of the EcoDots project and making the platform self-sustained (through fees paid by its members). The platform promotes sustainable tourism, e.g. through an EcoBnB community of green suppliers, facilitating hosts 'greening' their accommodation and services, as well as bringing on board more green companies along the tourism value chain.

Case Study: Circular Hotels, Spain

The Circular Hotels project (Mallorca, Spain) is a response to waste related to mass tourism. The pilot project was part of a regional circular economy concept. The main goal of the project was to allow tourism to produce concrete positive impacts on local population and on the environment. This project used waste from hotels and transform them, with the support of the local waste management company, into compost for local farmers who produce vegetables for those hotels. This brought mutual benefits to tourism, waste management and agriculture. An innovative partnership was created between a private IT service provider, the local waste and recycling public service provider, hotel chains and the island and regional government. The project combines a circular approach with new technology and digitisation of waste collection processes (e.g. measurement sensors and real-time IoT monitoring).

In general, digitisation will be more widely used in the future to support destination management organisations and public authorities in their decision-making. In addition, digital tools improve direct communication of destinations with visitors.

Case Study: Smart tourism destinations, Spain and Bulgaria

The Smart Tourism Destination (STD) tool introduces innovative, efficient and sustainable tools, techniques and processes at the level of local tourism destinations to make the tourism sector more resilient and responsible. The concept follows the 'Smart Tourist Destination (STD) Methodology', developed in Spain and based on an analysis of destinations. It has five axes and 400 indicators on governance, innovation, technology, sustainability and accessibility, promoting an integrated vision of the territory as a tourist destination. The STD methodology has already proven to be internationally transferable, with implementations in Spain, Mexico, Colombia and the EU Capital for Smart Tourism. This concept has inspired the shift towards the STD approach in other destinations in Europe. A similar project for Varna in Bulgaria developed activities and objectives to develop a smart tourism destination. The methodology builds on data-based knowledge management at the level of the destination. It requires strong cooperation between destination management, local and regional authorities and experts to establish monitoring systems and draw conclusions from their analysis.

Case Study: Digital skills for small players at the Online-Academy Dachstein, Austria

The Dachstein Salzkammergut Academy bundles knowledge on tourism-related topics in a specially designed e-learning portal. All tourism partners of the Dachstein Salzkammergut Region can access an extensive pool of knowledge. The courses consolidate the basics and provide input into a wide range of areas: online marketing, social media, digital communication, website, internet and booking systems. The courses can be accessed 24 hours a day via the online portal. The Academy is organised by a specific e-learning team under the umbrella of the local tourism association. Through a 'train-the trainer- approach, the regional tourism association helped the smaller local association to develop in-house skills for digitisation in tourism. This was then translated into tailored and targeted support for local tourism businesses which are mostly small and micro companies. Support, advice and training in digital skills is free-of-charge and close to their home (or online), so they avoid costly or time-intensive trips to larger cities. This bottom-up initiative shows how micro and small tourism companies can benefit from digitisation through smart and place-based support schemes, and how even local tourism agencies can build up a support service for local SMEs. This service can be offered in-house by a local tourism association, with no need for large investments or high maintenance costs.

Innovation and knowledge are key elements of all policy initiatives. These can refer to innovation in products, technological and digital innovation, more efficient management processes, training and capacity development or new marketing approaches. With tourism, new knowledge comes more from experts, professional service providers and tourism companies, and less from the traditional Universities or Research Institutes.

Case Study: Supporting SMEs to develop digital tools for storytelling, Ireland

Ireland's Ancient East Investment Scheme (Fáilte Ireland, 2017) aimed to transform the quality of interpretation, animation and storytelling at existing heritage and visitor attractions throughout Ireland's Ancient East. The grant scheme was implemented under the national tourism investment strategy that supports tourism industry growth in Ireland. Through this strategy, Ireland aims to deliver genuinely innovative projects to transform visitor experiences. The grant scheme brought together traditional heritage sites and visitor attractions with professional digital/IT service providers. One project is the new 'Masterpieces in Glass' visitor experience, in an 18th century Bishop's Palace. The outcome was a new 4D experience which brings to life the history of glassmaking in Waterford. Using augmented reality, visitors can explore rare objects used in glassmaking in the county. The example of the Ancient East storytelling and interpretation scheme shows how a grant can be used to promote storytelling in local attractions, to stimulate the use of digital tools for innovative tourism product development and to strengthen a tourism destination brand.

Case Study: Smart tourism network, Croatia

The Smart Tourism Network initiative (Pametan Turizam) is a private sector Croatian initiative using digital opportunities to support tourism development. Particularly since the pandemic, many tourism entities had to revise their strategies and see how to better invest in future activities and infrastructure. To reach these goals, in 2020 Pametan Turizam created a network of seven Croatian digital companies. The activities of these companies are complementary and together form a complete solution that can help destinations to become more sustainable, communicate their brand more clearly and digitise and distribute the offer to reach guests more easily. The initiative has already been launched in 20 Croatian destinations, and several have already started launching digitalisation projects. This case shows how private supply-oriented initiatives can stimulate innovation and digitalisation in tourism. Public authorities can support these initiatives and strengthen the visibility of technological and digital providers to make it easier for tourism companies to turn towards digitalisation.

Partnerships and collaboration are at the core of most policy initiatives. To make tourism more resilient against external shocks and to establish sustainable tourism models requires working with players from the complete value chain and, many times from outside the system, across the border or outside the destination. For example, sometimes the local waste company or local public transport becomes a key partner in a new initiative. In other projects, global technology companies or multinational tour operators need to be taken on board to generate a change. The connection to other services and business sectors becomes ever more important.

Case Study: Joint action for less pollution through cruise ships, Estonia

Cruise tourism has severe negative effects on the environment and the climate. Improving sustainability in the cruise sector is important in the light of increased customer environmental awareness and environmental regulations. The Port of Tallin – with its Sustainability Strategy –established a technical solution for ship wastewater disposal in Tallin. The project installed wastewater pipeline connections in the cruise terminal pier, directly connected to the municipal sewerage system. The micro-tunnel allows ships stopping at the Old City Harbour to now dispose of unlimited quantities of wastewater. The wastewater is then treated at Tallinn's treatment plants. To make cruise tourism more sustainable requires many environmental measures, not only on board, but in particular in the port areas and on the pier. However, to implement actions is not always easy, given the complex network of actors, environmental regulations and economic interests. The example of the micro-tunnel and the sustainability measures of the Port of Tallinn show that many negative environmental effects can be reduced when stakeholders work together. This includes port authorities, terminal operators, local, regional and national public authorities, cruise lines, research institutes and international organisations.

Case Study: Low-carbon mobility for climate-friendly holidays, Germany

The KlimaTour Eifel initiative aimed to reduce the climate-damaging emissions for a stay in the North Eifel (Germany) and to convince players in the tourism ecosystem to commit to becoming a climate-friendly and sustainable destination, reducing the CO2 emissions of travel to/from and stays/activities in region. The project for the first time enabled a nature park tourist region in Germany to calculate the 'CO2 footprint'. In the medium term it is expected to avoid 10% of tourism CO2 emissions through information and measures. One activity was to develop a free and integrated public transport 'Guest Card' for visitors. This required good cooperation between tourism agencies, public transport agencies, accommodation providers and local governments to develop effective networking in the region. The VRS (Rhein-Sieg) and AVV (Aachen city region) local transport associations became important project partners. The transport associations are also involved today as important contractual partners. Other tourism stakeholders such as excursion and activity promoters also participate in the card offering discounts. The case shows that sustainability in tourism can be achieved when engaging and addressing the complete tourism ecosystem, from transport to accommodation, restaurants, activities and destination management.

Case Study: EuroVelo Routes and cross-border cycling tourism, France

Alsace is full of attractions for fans of cultural sightseeing and authentic charm. The region is a typical representation of the 'Spritz' tourism type in our study. The Alsace tourism destination management organisation (ADT) actively promotes cycling tourism in the region. Three EuroVelo Routes cross Alsace (5, 6, 15). Several cross-border cycling routes have been developed and ensure a seamless travel experience. The EuroVelo routes emerged as part of an EU project to develop the European cycle route network. The project promotes integrated and sustainable travelling and tourism across borders in Europe. Cross-border integration of tourism products and natural areas is a challenge in many European border regions, especially rural and mountainous areas. Partnership, governance and cross-border/transnational cooperation in four key areas (infrastructure, services, communication and promotion, and monitoring and evaluation) have been key to developing sustainable tourism in Alsace and increase its benefit for the region. The ongoing dialogue among partners of Alsace à vélo is one of the key success factors. The dialogue facilitates coordinated activities, developing a comprehensive offer for cycling tourists that invited them to stay longer in the region. The COVID-19 crisis has been an important push factor for cycling tourism. An increase in cycling put the development of cycling infrastructure and routes higher on the agendas of local and regional authorities.

Case Study: Medical and health tourism products require new alliances, Finland

Medical and health tourism is a booming tourism segment. Many regions in Europe have a well-developed offer of medical and well-being services which is increasingly relevant for a specific type of tourism, mostly from non-EU countries. The example of Finland shows how this is actively promoted and used for the innovative development of tourism products and services. The Finnish government recently granted financing for promoting medical tourism under Visit Finland (which is part of Business Finland, formerly Finpro). A health travel manual for Finnish hospitals, private clinics, medical tourism facilitators and the hospitality sector was developed. FinlandCare offers a Hospital and Professional catalogue. Medical tourism can be seen as a complex network of niche markets. The link between medical services, tourism and technology is becoming ever more important. Clinics and medical services need to be put in contact with tourism services, accommodation and other activities. Medical tourists expect complete packages and seamless travel. A new player, the Medical Tourism Facilitators emerged. Medical hotels and healthy resorts offer a new combination of services.

After the COVID-19 experience, the call for not only smart but even ‘wiser’ destinations is getting louder. Wise destination management includes digital monitoring of visitor flows and efficient processes, as well as understanding and respecting (social and environmental) limits for sustainable tourism in a territory. In this sense, the artificial boundaries between the main destination and the surrounding sub-destinations, such as a city and its hinterland, become more and more blurred. This requires a more regional concept of smartness going beyond the traditional destination and creating symbiotic relationships with nearby territories. This thinking requires a more integrated territorial approach for tourism and integrating tourism in existing planning processes.

Case Study: Sustainable regional planning including tourism, Italy

Since 2018, the Region of Sardinia has been elaborating its new Regional Sustainable Development Strategy ‘Sardegna 2030’, involving regional and local institutions and civil society. The strategy shall be in line with the 2030 Agenda and the 17 Sustainable Development Goals, stressing the need for an integrated vision of development - economic, environmental protection and human and social rights. The Regional Forum for Sustainable Development was established as the place where institutions, enterprises and civil society can contribute to elaborating strategic documents for Sardinia in 2030. In March 2021 the Regional Sustainable Development Strategy entered a new phase with four in presence workshops, building on more than 30 virtual workshops during the COVID-19 period. This participatory process had involved more than 2,300 stakeholders by June 2021. Tourism was identified as a key topic in the near future to contribute or not to sustainable development. Tourism emerged as an emergency goal (Strong seasonality and territorial concentration of tourism) and a strategic regional goal (Sustainable tourism for socio-economic development and the protection of culture and biodiversity). The Regional Sustainable Development Strategy has a horizontal and overarching perspective. It should develop guidelines for territorial development and will feed into 29 sectoral plans in the region, including the Tourism Development Plan to be renewed in 2021. This integrated character of the Strategy ensures that important cross-fertilisation can take place between different plans and actions, for example in tourism, circular economy, energy, transport planning, climate change adaptation, natural protection and the ERDF Regional Operational Programme.

Case Study: Tourism in Smart Specialisation Strategies, Greece

The Smart Specialisation Strategy (S3) 2014-2020 of the Region of Crete embraced the vision of Crete’s innovative development. Among other priorities, Crete’s S3 aimed at using the potential of innovation and scientific knowledge to consolidate a competitive cultural-tourism complex, with unique and original features in the international market. Several measures in the S3 and funded by ERDF in 2014-2020 were linked to the cultural-tourism value chain, in particular using scientific knowledge, innovation and IT to promote better tourism services, differentiating tourism products to sectors where Crete could develop comparative advantages, enhancing of entry points and promoting Crete’s rich cultural heritage and interconnection with society and the local economy. The S3 strategy has shown that tourism needs a different approach to innovation. The complexity of the tourism ecosystem and the important role of players outside the region (tour operators, flight companies, travel agencies) makes it difficult to promote radical innovation or new models such as sustainable tourism. A key success factor of the S3 is that it managed to bring together different players in the region, particularly the research and university sector with the business sector.

These case studies leads us to formulate the following lessons learned in view of the Policy Objectives for EU Cohesion Policy (2021-2027).

PO 1 – A smarter Europe:

- The concept and methodology to make tourism destinations smart can be seen as a comprehensive tool set to introduce innovative, efficient and digital tools, techniques and processes in local tourism destinations to make the overall tourism sector more resilient and responsible.
- Smart Tourism destinations require a governance that connects the destination management organisations with other players in the tourism value chain. It is crucial to involve actors from the public sector, and in particular local institutions responsible for tourism, but also private tourism companies and experts in big data generation, analysis and use.
- Smart Specialization Strategies can help to develop an innovation-friendly environment and involve the complete value chain.
- Digital transformation of tourism plays a relevant role in many initiatives, with specific needs for digital marketing and communication tools, digital management support, use of Artificial Intelligence and big data for decision-making and monitoring, etc.
- Innovation centres and specific hubs (e.g. European Digital Innovation Hubs) have a huge potential to contribute to the digitalisation of tourism SMEs and ecosystems.
- Intermediate entities such as Tourism Innovation Centres can become important actors in implementing other public policy tools to support innovation in the tourism value chain and strive for higher added value elements in regions. They offer a huge opportunity to bring important players together.
- Business and innovation support schemes should be embedded in strategic frameworks and objectives to increase their effectiveness and contribution to wider objectives.
- Business and innovation support schemes require clear orientation and guidance for beneficiaries to manage their expectations and allow for capacity and skills development in line with product and process innovation.
- Business and innovation support schemes can promote digitalisation in tourism SMEs as well as partnerships between companies and digital service providers.

PO 2 – A greener, low-carbon Europe:

- There is a huge potential to promote circular approaches and reduce waste and wastewater from tourism.
- Local and regional authorities can have a steering role and develop regulations to respect limits and carrying capacities of their own territorial resources.
- Working with the whole tourism ecosystem and other players (mobility, agri-food producers, energy generation, travel industry, cruise lines etc.) in the territory is key to becoming more climate-friendly as a destination and region.

- Support the design and implementation of sustainability strategies in tourism destinations and for the tourism products. More sustainable tourism models can only be achieved when all stakeholders work together and contribute to reducing negative social and environmental effects.

PO 3 – A more connected Europe:

- Regions may use funding from EU recovery plans to develop cycling tourism infrastructure in their territories. After all, cycling is an environmental means of transportation and can be done while respecting social distancing rules.

- The EuroVelo routes offer an important framework and concrete starting point to develop a comprehensive network with the support of multiple players.

- Supporting alternative travel modes (train, bus) that are less CO2 intensive can support more sustainable tourism.

- Cruise ship tourism and air travel is still highly polluting and contributes to GHG emissions. Projects to reduce the negative environmental effects will benefit more sustainable tourism in many coastal regions and cities.

PO 4 – A more social Europe:

- Tourism can promote local economic and social development. Most impact will be through integrated place-based approaches and a common mission, e.g. to become a more sustainable or climate-friendly destination.

- Health tourism is an emerging model.

- Education can have a direct impact on the quality of tourism employment.

PO 5 – Europe closer to citizens –integrated development:

- Make it easy for bottom-up initiatives to join larger projects.

- Create adequate spaces and opportunities for grass-roots initiatives to meet with innovators, digital experts, entrepreneurs and funders.

Horizontal lessons are:

- Regional initiatives can boost local developments but should leave room for bottom-up initiatives to blossom. Support can be through capacity building, network moderation and on-going advice programmes.

- Direct networking for national, regional and local players helps to embed sustainable tourism development into wider frameworks of cohesion and territorial policy.

- A sustainable tourism model requires tourism flows and capacities that are managed from an overarching perspective in line with territorial development goals and limits. Destination Management Organisations have a key role, contributing to leadership, governance and implementation. They should be institutionally strengthened to be able to prepare for new challenges and become a true enabler of competitive sustainable and smart tourism (see also UNWTO, 2019).

- European territorial cooperation programmes (Interreg) can facilitate the development of tourism networks across national borders and support European integration of tourism regions and destinations.

6 Lessons learned and policy pointers

The tourism sector has to build resilience so it can respond quickly to new rules for crowd management and social distancing. Recovery should mean not only going back to the volumes of 2019, but – from a community point of view – incorporate new tourism models that are more inclusive, sustainable and smarter, with new and additional drivers (other than the market or demand). This will require a stronger role for regional and local authorities and stronger links within the tourism ecosystem.

Establishing limits for growth in volumes and more incentives for high-quality and sustainable tourism are key for recovery and future tourism models. With digital tools and monitoring systems, the first instruments to monitor visitor flows and capacities are now in place and have been implemented. This will lead to broader knowledge and better-informed decisions on visitor flows, crowd management, alternative attractions, offer- and capacity-based development of the sector.

The question remains, who should establish limits (of capacity, visitor thresholds), who has the overview of regional/local visitor flows, who takes decisions? Local/regional tourism boards will have to build new capacities, become smart and carry out new functions in the future.

Taking this discussion forward, the following sections summarise lessons learned from this study (see section 6.1), provide some policy pointers on how to support the recovery and resilience of tourism regions in particular in the context of EU Cohesion Policy (see section 6.2), and also reflect on policy pointers for different types of tourist regions (see section 6.3).

6.1 Main lessons

Overall, five lessons can be drawn from the study to guide policy on the recovery and preparation for the future of tourism and tourist regions:

1) Tourism is important for all regions. More and more policy initiatives reflect the value of tourism for local and regional economies and try to either increase quality, productivity and effectiveness of tourism sectors or reduce seasonality and negative environmental effects through specific policy measures. The COVID-19 crisis and the standstill of tourism in many European regions has shown how tourism affects regional economies and life in general. Both on the supply side (many people in the sector lost their job) and on the demand side (for many people no leisure activities were possible for many months). Most policy initiatives so far address the supply side and the value chain through destination management governance. There is still room to develop measures that address the demand side and manage growth and increased local benefits. There is a need to straighten out and steer tourism flows, to set limits on harmful activities and to empower destinations to decide which kind of tourism they want.
2) COVID-19 has shown that every place can be a tourism destination. Less-crowded rural destinations, national parks and other nature-related places, even a village just outside a big city, have been winners of leisure and travel during the pandemic, mostly for domestic visitors. This will probably continue in the next years and they will need professional visitor flow and destination management tools to continue to encourage sustainable and climate-friendly tourism. The touristic offer should build on the natural and cultural identity of the region, engage small players across the territory and articulate the governance of the tourism ecosystem to avoid harmful effects of overtourism. Larger cities should more actively engage with the surrounding territory to diversify attractions and create a local offer for residents.
3) There is a general trend to more sustainable tourism, reducing the negative effects of travel, accommodation, catering and activities on the environment. Tourism should also become more responsible and respectful of the territory and local communities. Decarbonisation is an objective of many new strategies and actions.

Circular approaches should help to reduce the waste generated by visitors and increase the more efficient use of resources. Sustainability management should become a part of destination management and not be left to individual players or private initiatives. This might require adaptations in public services and infrastructure. Some regions need to prepare their destinations for the effects of climate change or develop adaptation measures.

4) Digital tools for tourists have come to stay and will boost digitisation also in non-health related areas. Digital travel certificates are still obligatory in many EU countries. The EU Digital COVID Certificate, national vaccination certificates and up-to-date information on safe travel conditions will probably become a normal travel accessory for the next months and years and might even push the use of smartphones for still reluctant people. At the same time, many destination management organisations have used the mandatory business pause to further develop their market intelligence tools, decision support systems, training for digital skills, social media marketing instruments and online collaboration networks. Digitisation will be the backbone of many new policy initiatives.

5) An innovative and open mindset as well as creative ideas will be needed to adapt to change and prepare tourism regions for the future, as well as to increase productivity in some segments of the tourism industry. Not only the public sector but also other players of the tourism ecosystem need to get engaged. Ideas and innovation as well as new partnerships should be accelerated. Here, the public sector can play a role in the inspiration, motivation and support of ideas, innovations, pioneering networks and partnerships. Partnerships between public administration, sectoral policies, public services, small and large private stakeholders in the regions and big travel industry players outside the region should be strengthened to prepare for the challenges to come. Better coordination between national and regional tourism policies and measures needs to be ensured.

6.2 Policy pointers

The lessons lead to several policy pointers which may inform a new Tourism Agenda for Europe and the use of ERDF funding to prepare tourism regions for a sustainable and digitalised tourism future. The Council invited the Commission and Member States in its conclusions (adopted on 27/05/2021) to design a European Agenda for Tourism 2030/2050 in participation with stakeholders. The following paragraphs suggests a few points for this Agenda emphasising the need to use the pandemic as an opportunity for tourism destinations and ecosystems to build back better and become more resilient and sustainable.

6.2.1 Local and regional action

Local and regional action in destinations needs to focus on making them attractive places both for visitors and residents, embed tourism as an important part of broader spatial development strategies, widen destinations beyond a region's main attraction points, spur digitalisation of the tourism sectors and develop attractive sustainable tourism offers, ensure development of the tourism destination involves all players of the tourism ecosystem and focus on the development of place-based value chains so more of the economic benefits stay in the region.

Attractive places for everybody. A destination is far more than just a tourist site. It is a place where people live, work and visit, in line with the Barcelona Declaration on "Better Places to Live, Better Places to Visit" (NECSTouR, Europa Nostra, European Travel Commission, European Cultural Tourism Network, European Heritage Alliance 3.3, 2018). Being a great place to live in and to visit is more genuine, sustainable and attractive in the long-term. Places where growing visitor numbers drive up housing prices and force away locals who cannot afford living there anymore will not be sustainable. Consequently, destinations need to be developed with both inhabitants and visitors in mind – in the best case even in cooperation with them. Examples for concrete actions include:

⇒ **Decision makers in the regions, destinations and ERDF programmes** should support investments in tourism infrastructure only when it is demonstrated how this will also benefit inhabitants of the destination.

⇒ **Citizen involvement platforms and participatory activities** for the development and recovery of tourist destinations can help to ensure that developments target both tourists and citizens. Such platforms or activities run for instance by regional authorities or destination management organisations could be supported by ERDF programmes under PO 5 'Europe closer to citizens'.

Tourism as part of a broad spatial strategy. Thinking a place beyond its function as a destination, implies also that tourism strategies need to be seen in a wider perspective. They need to be part of – or at least embedded in – a wider spatial strategy or vision for the area. This is particularly relevant to making tourism more sustainable. Going beyond green washing will only work if tourism is an integral part of a local or regional sustainability strategy, alongside other sectors and players. Tourism can contribute to making a place more sustainable. This however requires a broad strategy which is shared by all relevant players. Examples for concrete actions include:

⇒ **Integrating tourism in broader sustainable development strategies** for regions or destinations. Such integrated sustainable strategies are advocated by the Territorial Agenda 2030[19]. Development and implementation of such strategies by regional authorities or destination management organisation could. be supported by ERDF programmes under PO 2 'A greener low-carbon Europe'.

⇒ **Strengthening key tourism stakeholders to ensure smart and sustainable management of tourism destinations** in line with the UNWTO Guidelines for Institutional Strengthening of Destination Management Organizations (UNWTO, 2019) could be supported by ERDF programmes under PO 1 'A smarter Europe'.

⇒ **Cohesion Policy tools** such as Integrated Territorial Investments (ITI), Community Led Local Development (CLLD) or Sustainable Urban Development (SUD) could be employed by regional authorities, destination management organisations and ERDF Managing Authorities to support the development and implementation of integrated spatial-tourism strategies.

Cooperation beyond the usual suspects. A resilient and sustainable place which is attractive for visitors and tourists requires cooperation of a wide range of players. Beyond the usual suspects involved in destination management, inhabitants, transport, environment, water and waste management, planning authorities, NGOs. local businesses and relevant players from neighbouring areas need to be on board. Examples for concrete actions include:

⇒ **Smart specialisation strategies** and related entrepreneurial discovery processes should address tourism as a topic. They should involve destination management organisations and relevant regional tourism players in the ecosystem to build up regional innovation capacities for tourism. This could be supported by ERDF programmes under PO 1 'A smarter Europe'.

⇒ **To support tourism capacity building** and cooperation mechanisms, regional and local authorities as well as destination management organisations should exploit the diversity of European capacity building platforms and offers (e.g. TAIEX, ERASMUS+, Interreg Europe Policy Learning Platform etc.).

Broadening destinations. The development of sustainable visitor destinations can benefit from thinking beyond single points of attraction. Combining several points in a region helps reduce the pressure on single hotspots, e.g. overcrowded 'old towns' or monuments. It also allows for more genuine visitor experiences, dispersed economic benefits from tourism and developing places which are attractive for both inhabitants

[19] See www.territoritorialagenda.eu

and tourists. This requires cooperation between visitor places in a region as well as with tour operators, tourist guides, and public transport providers to ensure good and sustainable connections between the places. Examples for concrete actions include:

⇒ **Integrated strategies, infrastructure and services** (e.g. sustainable local transport services) allowing more destinations beyond the main points of attraction, should be designed and developed by regional and local authorities in cooperation with destination management organisations and transport planners.

⇒ **The development and implementation of broadening strategies** could be supported and complemented by integrated territorial strategies (see above) and the development of digital services.

⇒ **Investments in sustainable transport solutions** connecting destinations and the hinterland (including regional trains, buses, bike schemes) as well as the development of digital services and investments in digital infrastructure supporting broader destinations could be supported by ERDF programmes under PO 3 'A more connected Europe'.

Place-based value chains. The tourism sector is highly complex with a wide range of players providing services and goods in complex ecosystems. This involves players at the destination as well as in the hinterland (functional region) and elsewhere. To make tourism more genuine and sustainable and ensure that the inhabitants of tourist destinations also benefit from tourism, needs a stronger emphasis on place-based value chains. Embedding tourism in a local or regional sustainability strategy and broadening destinations can be stepping stones for this. Examples for concrete actions include:

⇒ **The development and management of regional tourism value chains** can help a more place-based approach to tourism offers and strengthen regional tourism ecosystems. This would imply that more decisions on tourism offers are made in the destinations and that more benefits generated by tourism stay in the region. This can be supported ERDF PO 1 'A smarter Europe'.

⇒ **Innovation and forward-looking regional clusters** driven by local tourism players can be supported by regional authorities and destination management organisations. This could include supporting entrepreneurial discovery processes, the generation of new ideas, start-ups, entrepreneurship and innovative SMEs to strengthen regional tourism ecosystems. ERDF programmes can support this under PO 1 'A smarter Europe'.

Attractive and sustainable offers for local and global tourists. To encourage tourists to make sustainable choices, needs attractive sustainable offers. Rather than pressing the 'guilt button', sustainable tourism offers need to be more attractive. This concerns both the offers at the destination and for coming to the destination, as transport is a major factor for making tourism more sustainable. Shifting to sustainable tourism and transport might be easier for regional and national visitors, who predominate in most European destinations. This requires cooperation with transport providers and other bodies to develop attractive sustainable offers. International visitors are important for most destinations, not at least as they tend to spend more money than national visitors. Developing attractive offers for them which are sustainable from door to door is more challenging, though a lot can be done to reduce the ecological footprint of international tourism. This needs to build on cooperation with tour and rail operators including increasing the attractiveness of rail connections (especially high speed and night trains) as well as international tour operators, suppliers and tourism agencies. In short, to be sustainable, tourism needs to become more offer driven. Examples for concrete actions include:

⇒ **New solutions and approaches to sustainable long-distance travel** are needed. This might include compensation for pollution (e.g. CO2-taxes), new tourism concepts (e.g. long-term stays and digital nomads) or virtual tourism approaches so destinations can also profit from virtual tourists. DG REGIO, DG GROW, DG MOVE and DG CONNECT could join efforts to support the development of long-term concepts and solutions for sustainable travel to and from destinations.

⇒ **Circular economy tourism ecosystems** and sustainable local transport services can be developed in destinations, including cooperation between local and regional authorities, transport planners and destination management organisations. This could be supported by ERDF programmes under PO 2 'A greener low carbon Europe' and PO 3 'A more connected Europe'.

Digitalisation for direct contacts with visitors. Digital tools and digitisation will be drivers of change and require both technological advances and clear governance. Knowledge about what visitors look for and informing them about places to visit, services and public transport are essential for the development of a tourist destination. Digitalisation can help in the form of apps offering a one-stop-shop for tourists with timebound information on services, public transport and waiting times for attractions as well as services to buy tickets, book tables, services, transport, etc. Communicating directly with tourists can be a game changer. Examples for concrete actions include:

⇒ **Digital visitor apps** and possibly even open-source solutions for such apps could be improved by the relevant players in a destination. This may also support visitor management, crowd monitoring, just-in-time information on congestion, booking tools, etc. The development of such apps and investments in knowledge management and digital infrastructure (e.g. data centres, web cams) could be supported by ERDF programmes under PO 1 'A smarter Europe'.

⇒ **A European visitor umbrella app** or central entrance point could guide visitors to local and regional apps (following the reopen.europa.eu example). This would help European tourists criss-crossing between various destinations. The development could be initiated by the DG REGIO in cooperation with DG GROW and JRC. In parallel the European Commission could also set up a catalogue of digital tourist offers and solutions to inspire destinations.

⇒ **Local and regional innovation hubs** and centres are important accelerators for the digitalisation of tourism SMEs and tourism ecosystems. Their development can be supported by ERDF programmes under PO 1 'A smarter Europe'.

Diverse visitors. Visitors have different needs and expectations and sometimes they conflict with each other. A sustainable tourism sector which is part of a local or regional development strategy offering genuine visitor experiences needs to attract visitors with different profiles and balance their interests. Digitalisation can help target group-oriented information and communication with different types of visitors. Local and regional players in the tourist destinations can spur the diversification of tourism offers and tourism ecosystems. This can be supported by ERDF and ESF programmes under various policy objectives.

⇒ **Bottom-up initiatives to diversify** tourism offers are important to ensure that inhabitants, social groups and small local enterprises are on board for further development of the tourism sector. This can be supported by ERDF programmes under PO 5 'Europe closer to citizens'.

6.2.2 European level action

European level action is needed to support the recovery towards the more resilient, sustainable and digital tourism in Europe asked for in the Council conclusions of 27/05/2021 and already partially proposed in the Commission's stakeholder consultation on the 'transition pathway for tourism' (Summer 2021).

European single tourism market. The European single market does not fully cover common standards and requirements to ensure that tourists can easily travel across the EU with a single document on COVID-19 requirements or for common definitions of sustainable tourism. Some straightforward measures which could make tourism offers more sustainable conflict with international standards and criteria e.g. for hotel classifications. One example is the HOTREC requirement for 4 and 5 star hotels to offer a minibar in every room.[20] A first step should review whether criteria which hamper reducing the ecological footprint of accommodations could be replaced. Furthermore, it could be considered whether some EU Ecolabel[21] criteria could be added to encourage accommodation to become more sustainable. In any case, adjusting existing labels to include sustainability criteria is better than new labels.

⇒ **Safe and seamless travel** within the EU requires more coordination and common standards for COVID-19 certificates and the rights that come with them. The European Commission could ensure that a single COVID-19 certificate is sufficient and no additional papers are needed to meet national or regional requirements.

⇒ **Sustainable tourism** in the EU requires common standards and certification systems for the hospitality sector. Ideally, this would an adjustment of existing international standards and certificates and not a new certificate. DG REGIO together with DG ENV, DG CLIMA and tourism organisations could start a dialogue on how to adjust international and European standards and criteria and how to implement sustainable standards at national and regional level to reduce barriers to sustainable solutions and promote the shift towards sustainable tourism.

European tourism roundtable(s). Tourism is a horizontal activity and depends on the collaboration of a wide range of players. To strengthen tourism in European policy a number of roundtables might help.

⇒ **A European interservice roundtable** could be a platform to better coordinate EU policies, initiatives and support tools which affect tourism destinations and industries across all relevant DGs. Tourism and the above-mentioned policy pointers cut across the competences of multiple DGs, most prominently DG REGIO and DG GROW. However DG MOVE is also concerned for sustainable transport solutions, DG CONNECT for digitalisation, DG AGRI for integrated strategies for rural development and rural tourism, DG EMPL for boosting skills in tourism not at least for sustainability and digitalisation. European policies, programmes and initiatives can help to stimulate local and regional players and businesses to develop tourist destinations and ecosystems. Coordinating the work of DGs can achieve a lot with the existing tools. This suggests stronger inter-service cooperation to jointly address key priorities for recovery of the tourism sector.

⇒ **A roundtable with ERDF, CF, ESF and EAFRD programmes** addressing tourism could strengthen mutual approaches to supporting tourism under Cohesion Policy. This could be under the Coordination Committee for the European Structural and Investment Funds (COESIF), the Expert group on European Structural and Investment Funds (EGESIF) and their follow-up committees in the new funding period. Also RRF players should be included in the discussion, as the link between national RRF players and representatives from tourist destinations should be strengthened to ensure that RRF investments support a more resilient, sustainable and digital future for tourism.

⇒ **A European public-private roundtable on tourism** could bring together key public policy making players and representatives from the tourism industry in Europe. The private sector and its various organisations are essential for shaping recovery and the transition to sustainable and digital tourism. To strengthen synergies in tourism, DG REGIO in cooperation with DG GROW could initiate a structure dialogued on public policy making and private investment.

European tourism monitoring platform. For both regional tourism statistics and monitoring tourism policies there is room for further development. Currently, there is no blueprint for European destinations on how to become more sustainable and resilient. The diversity of destinations and offers as well as the complexity of tourism ecosystems require place specific solutions. Despite all their diversity, destinations can learn from

[20] See also https://www.hotelstars.eu
[21] See also https://ec.europa.eu/environment/ecolabel/index_en.htm & https://journals.sagepub.com/doi/10.1177/1356389018765797

each other about how to become more sustainable and resilient. To stimulate mutual learning a European monitoring platform (potentially building on the Virtual Tourism Observatory) could be set up allowing regions and/or destinations to report and benchmark their progress according to a few simple criteria as well as search for other destinations with potentially valuable experience. The reporting needs to be simple, possibly in form of a Sustainable Tourism Governance Assessment Scorecard system, following the example of GOCAPASS[22]. Operationally it could be a website where destinations can both provide monitoring information and search for others, like a web platform for sustainable and resilient tourism regions.

⇒ **European-wide regional tourism statistics** are to some degree already collected by Eurostat. However, to better inform decision making more indicators are needed. DG REGIO together with DG GROW, JRC and Eurostat could investigate which regional tourism statistics are most relevant and can be collected in a harmonised way for all EU-27 regions.

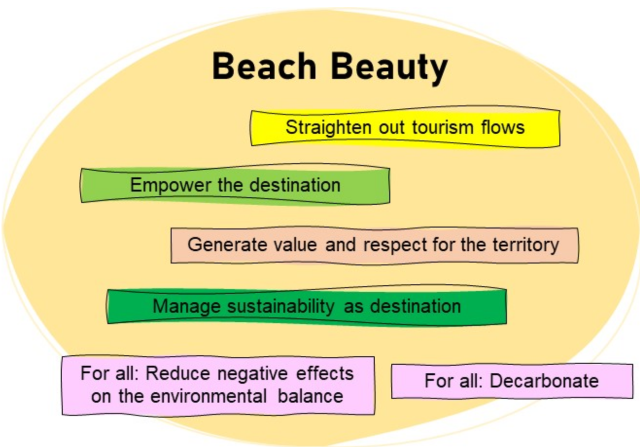
⇒ **A European Sustainable Tourism Governance Assessment Scorecard** could be developed. Following the example of EU Science Hub Knowledge Centres, this could be an online platform collecting information on tourism strategies and monitoring their progress. DG REGIO in cooperation with DG GROW and JRC could develop and set up an EU Tourism Dashboard as proposed in Council conclusions (adopted on 27/05/2021).

Taken together, action at all levels from local to European must work towards decarbonising and reducing the negative environmental effects of tourism. Digitisation and innovation will be inevitable tools for the recovery of tourism destinations and industries while making them more resilient and sustainable. Furthermore, tourism needs to be seen as integral in spatial planning and should be in continuous contact with sector policies such as transport, digital infrastructure and equipment, water and waste management, energy, public spaces and infrastructure. Good governance and collaboration of stakeholders is needed in destinations, Members States and the EU, as well as across borders in the context of Interreg.

6.3 Policy pointers by types of tourist regions

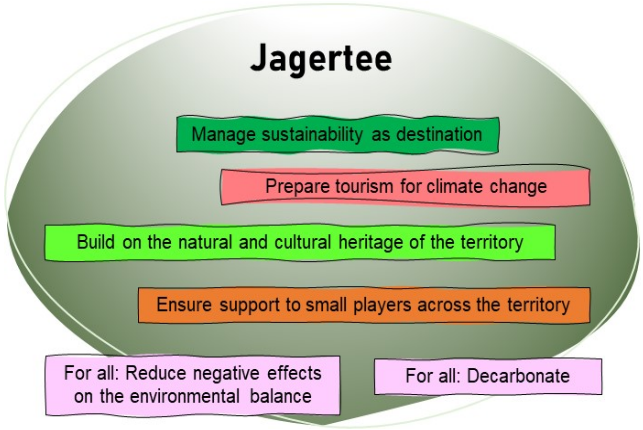
These lessons can be applied to develop recommendations for the different types of tourism regions:

Beach Beauty: Sun & beach destinations are looking for more sustainable tourism, building on the positive examples they have been developing for years. Negative effects of overtourism and dependence on travel industry players from outside the region can be overcome by models and approaches that empower the destination and promote community engagement. Tourism activities should generate more value and respect for the territory. Sustainability needs to be managed for the destination as a whole and solutions should not be left to individual initiatives or pilot projects. Tourism flows should be straightened out and steered by smart visitor management.

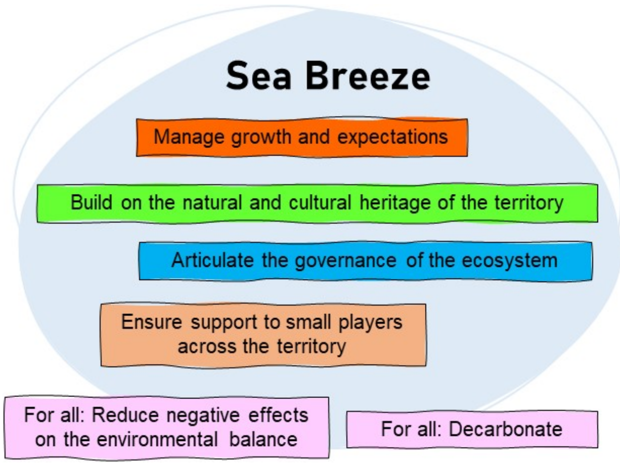


[22] https://www.spatialforesight.eu/files/spatial_theme/spatial/publications/Brief-2016-6-160222.pdf

Jagertee: Attractive mountainous regions need to prepare for the effects of climate change. Diversification and connecting to other sectors in the tourism ecosystem becomes more important. Sustainability needs to be managed for the destination as a whole and solutions should not be left to individual initiatives or pilot projects. Regions should build on the natural and cultural identity of the territory to develop new visitor experiences. Multiple, small tourism SMEs across the territory require specific support to promote digitisation, decarbonisation, quality tourism and more sustainability.

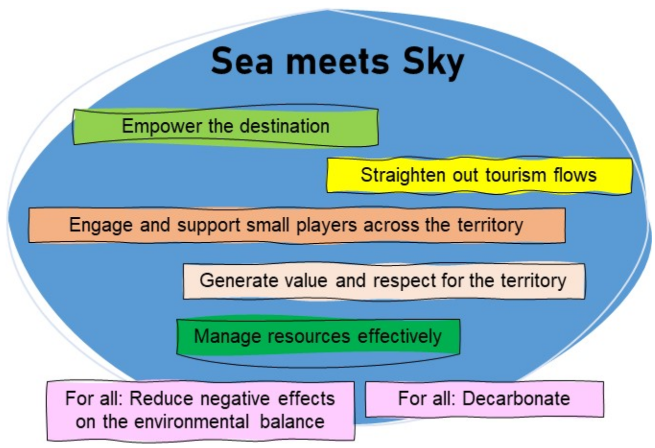


Sea Breeze: Coastal regions in Western and Northern Europe are becoming more and more attractive. They need to manage the increase in visitor numbers and expectations of a growing industry. At the same time, they need to avoid copying the Beach Beauty tourism model and should build on the natural and cultural identity of the territory to develop unique products and services. In many regions, articulate destination management governance is still in its infancy and needs to be strengthened in view of new challenges such as digitisation, decarbonisation and environmental effects. Multiple, small tourism SMEs across the territory require specific support.

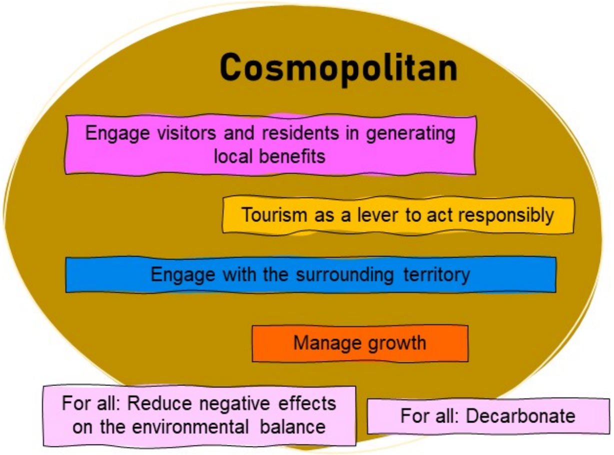


Spritz: Rural regions and areas close to nature and national parks have been winners from the pandemic. In many regions, articulate destination management governance is still in its infancy and needs to be strengthened in view of challenges such as digitisation, decarbonisation and negative environmental effects. Multiple, small tourism SMEs across the territory require specific support. Regions should build on the natural and cultural identity of the territory to develop new visitor experiences. The unexpected increase of visitors in vulnerable places with limited carrying capacity make it necessary to monitor and steer visitors and limit the growth of tourism in the region.

Sea meets Sky: Europeans outermost regions face specific challenges to prepare for a sustainable and resilient tourism. Their dependence on air/cruise travel and on large travel industry players from outside the region as well as vulnerability



to climate phenomena and natural disasters weakness the tourism value chain in these regions, despite their apparent attractiveness. Future policies should seek to empower the destination and develop capacities to manage resources effectively. Low-carbon, strategic partnerships need to involve cruise companies and airlines. Tourism activities should generate more value and respect for the territory. Tourism flows should be straightened out and steered by visitor management. Multiple, small tourism SMEs across the territory require specific support. Solutions for more sustainable connectivity and compensation schemes for visitors should be developed.



Cosmopolitan: Urban tourism has largely suffered from the pandemic and not recovered yet. However, it is to expect that overtourism will return in many city destinations. Usually destination management organisations are well developed and equipped. However, they might need more capacity to monitor and steer visitors and manage growth in the medium-and long-term future. City centres need to develop approaches to engage with the surrounding territory to distribute visitor flows and create sustainable tourism experiences. Tourism should be used more often as a lever to act responsibly and to engage with residents. There should be more opportunities for visitors and residents to jointly generate benefits for the local community.

Finally, all types of regions should decarbonise and reduce the negative environmental effects of tourism in the destination and the territory. Digitisation and innovation will help implement the above-mentioned recommendations. Sustainable tourism follows sustainable territorial development. Tourism needs to be seen as integral in territorial planning and should be in continuous contact with sector policies such as transport, digital infrastructure and equipment, water and waste management, energy, public spaces and infrastructure.

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KN-06-21-171-EN-N

Publications Office
of the European Union

ISBN 978-92-76-43802-1