



Tourism in Transition

A New Consensus for Change

EU Mandate 2024 - 2029

The Tourism Manifesto^[1] is an alliance of over 70 public and private sector organisations working to build consensus on policy priorities and support good practice. The visitor economy celebrates our culture and remains one of its success stories. To maintain progress, this most European sector needs a strategic re-set as the EU's institutions reassemble for the 2024-2029 mandate.

The tourism and travel industry is embedded in the European project. Enabled by freedom of movement, it is central to Europe's continued appeal as a place to live, work, visit and do business. It fosters our sense of identity, promotes understanding and integration, diversity and inclusion. It projects significant soft power for the EU and generates valuable export income.

Effective EU leadership and policy coordination is needed to address obstacles to progress, and enable a better environment for business and workforce, visitors and their host communities. The potential benefit is clear, but so is the socio-economic risk if we do not provide smart support for positive change throughout the visitor economy within which tourism takes place.

The visitor economy covers all regions and multiple sectors: leisure and business travel, culture and gastronomy, accommodation, meetings, exhibitions and events. It delivers benefit to urban and rural communities across the region. More coordinated EU action is needed to channel investment effectively, to support value-adding, drive innovation and help our interconnected ecosystem decrease negative impact.

Tourism can and should champion Europe's appeal and its competitiveness. Visitor revenues help safeguard and provide citizens' access to natural and cultural heritage and pay for infrastructure. But our micro/SME-dominated sector confronts a range of challenges: complexity and uncertainty in regulatory compliance and business adaptation, and widespread stigmatisation.

Demand for tourism in Europe is growing. While this is welcome, growth requires management. Conventional success metrics of GDP and jobs still matter but are insufficient by themselves. The Tourism Manifesto recognises the need for change, and the system-wide effort it requires.

We need a coherent EU vision for the visitor economy in 2030, with political leadership and a strategy to match. Without it, successful sectoral transition is in doubt. Together for EU Tourism - T4T and the Tourism Transition Pathway^[2] recognised tourism's importance in Europe's post-pandemic recovery but by themselves they are not sufficient.

The Tourism Manifesto proposes four pillars to support the tourism industry's long-term success.

Pillar I: Decarbonisation

Our sector is committed to climate action. It supports the green transition and science-based targets. To meet these, system-wide change is necessary from travel and tourism to construction and food production. Characterised by micro-SMEs and complex supply chains, the sector needs a clear and proportionate approach to enable decarbonisation and improve environmental performance.

Success factors

Single reporting tool: Simplify compliance to accelerate adoption tackling all relevant EU legislation

Harmonised core environmental metrics: Harmonise and simplify core metrics on carbon emissions and other environmental impacts of travel and tourism services, promoting comparability and transparency within wider context of ESG metrics and sustainable development goals.

De-risk transition: Make change easier and less expensive and provide more business certainty.

Investment: Drive public and private investment in infrastructure and transitional technology.

Response to climate change: Practical and creative approach to adaptation and sectoral resilience.

Pillar II: EU Vision and Strategy

An EU tourism strategy is needed that considers the needs of the sector and the economic, geopolitical and societal benefits it can deliver.

The Manifesto acknowledges the initiatives of the last mandate and their continued implementation, but we urgently require greater political commitment, coordination, and financial support.

We need a response to the cross-cutting policy responsibility affecting the visitor economy, from transport and consumer rights to taxes and borders. Siloed policymaking has inhibited progress.

Success factors

EU Vision and Strategy for EU Tourism in 2030 and beyond: Identify the overall aims for European tourism and visitor economy, define what 'good' looks like, agree a clear strategy and ensure an enabling framework of smart regulation, good practice and funding in support.

Integrated policy development and governance

- Commissioner or other senior appointment with explicit responsibility for EU policy impact on the visitor economy^[3]
- Inter-service coordination of policy and funding affecting the visitor economy
- European Parliament Tourism Task Force with support from Tourism Manifesto
- Twice yearly Ministerial meetings on tourism and the visitor economy

Smart EU funding for adaptation, innovation, and assuring the sector's twin transition as part of a strategy for sustainable tourism and sectoral resilience.

Pillar III: Connectivity and borders

Resilient connectivity and open borders are strategic requirements for all parts of the economy. Tourism is particularly vulnerable to disruption.

Success factors

Sufficient **border infrastructure** and resources to cope with visitor flow.

Faster implementation of **digitalised visa processes**, with renewed focus on facilitation in source markets and compliance with Schengen Code standards.

Sufficient progress on **WHO-agreed digital certificate**, following success of DCC, to ensure resilience in the event of future public health emergency,

Continually updated **contingency planning** in anticipation of external shock or major incident, as part of sectoral resilience and crisis management.

Pillar IV: Innovation & Adaptation

To support businesses and destinations to tackle daily challenges and changing patterns in the visitor economy, an enabling framework at EU level can enable success at all levels.

Focus should be on measures that enable progress on sectoral employment appeal, capacity optimisation, destination management, product and visitor diversification, digitalisation, data and skills.

Success factors

European Dataspace for Tourism: Successful delivery of the EU's harmonized dataspace enabling data-driven solution to establish and manage carrying capacity and develop flow management tools and drive diversification.

Skills training and sectoral appeal: Upskilling and training which, together with innovation in new products and services will enable the sector to add value, compete effectively for Europe's talent, and encourage entrepreneurial activity.

[1] <https://tourismmanifesto.eu/>

[2] [Tourism Transition Pathway](#)

[3] Member state competence for tourism is assured under the Lisbon Treaty. More EU leadership is needed to ensure the sector has a policy framework for the visitor economy that will enable tourism to optimise benefit to Europe and minimise negative impact.