

Relaunching transport and tourism in the EU after COVID-19: Tourism sector



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Due to the impact of the pandemic on tourism, the **overall contribution of tourism to total GDP in**

Europe halved from 9.5% in 2019 to 4.9% in 2020. **International tourism arrivals in Europe dropped by 70% in 2020.** The World Travel & Tourism Council (WTTC) reported that **3.6 million jobs were lost in Europe in 2020.**

Main observations

COVID-19 caused a large drop in international tourism arrivals and receipts in 2020, putting EU Member States' tourism industries in

jeopardy in terms of income and job losses. Before international inbound tourism resumes, **intra-European and domestic tourism represent the only chance to counterbalance and mitigate the financial losses.**

The European Travel Commission's (ETC) report (July 2021) outlined an **optimistic scenario for the summer season 2021**, expecting a significant tourism rebound in the third quarter of 2021. Yet, for a proper overview it is necessary to wait for official data for the summer season 2021.

The spread of **the more transmissible COVID-19 Delta variant has hindered the consistent use of the EU Digital COVID Certificate** as national authorities of some EU Member States adjusted travel protocols accordingly.

Travel and Tourism patterns and practices have changed due to the pandemic, showing a tendency towards closer destinations (domestic travel, tourism of proximity, short haul trips), longer

holidays, last minute bookings, and increased concern about safety and hygiene.

Digital and green transitions were emerging trends in the industry, prior to the pandemic. The pandemic accelerated the **call for a green and digital transformation.** The industry must continue to build digital skills, implement digital solutions, build sustainable infrastructure, and address sustainable travel patterns.



Conclusions and policy recommendations

Tourism is an important and multifaceted industry with significant multiplier effects on other industries, making it a priority in the EU Agenda. Yet **more visibility is required regarding the coverage of tourism in financial programs and EU policies.**

In the short run, tourism governance needs to be improved by **developing a bold and dedicated EU tourism strategy** (The European Agenda for tourism 2030/2050), in partnership with different authorities at all governance levels and industry players, with clear aims, objectives, and implementation plan.

The research

provides with an overview of the repercussions of the COVID-19 pandemic on the tourism sector, as well as policy recommendations to address the challenges emerging from the crisis.



Access this note

The EU Digital COVID Certificate is a very important instrument for reactivating tourism flows. There is **an urgent need to harmonise protocols** (e.g. for children, regarding travel to third countries) and **improve communication about travel protocols and national health passes usage for EU citizens**. Easing procedures at the EU level would facilitate a faster recovery.

An overview of the financing opportunities from the Recovery and Resilience Facility (RRF) and the Multiannual financial framework (MFF) 2021-2027 **is needed** to better inform and promote financial opportunities for tourism stakeholders in Member States.

Eurostat should improve the measurement of the economic performance in the tourism sector by introducing *Tourism Satellite Accounts* (not just at the Member State but also regional level). Eurostat should also develop and measure the environmental and social performance of the tourism industry.

A European Tourism Data Space should be developed to favour the digital transformation of the tourism industry.

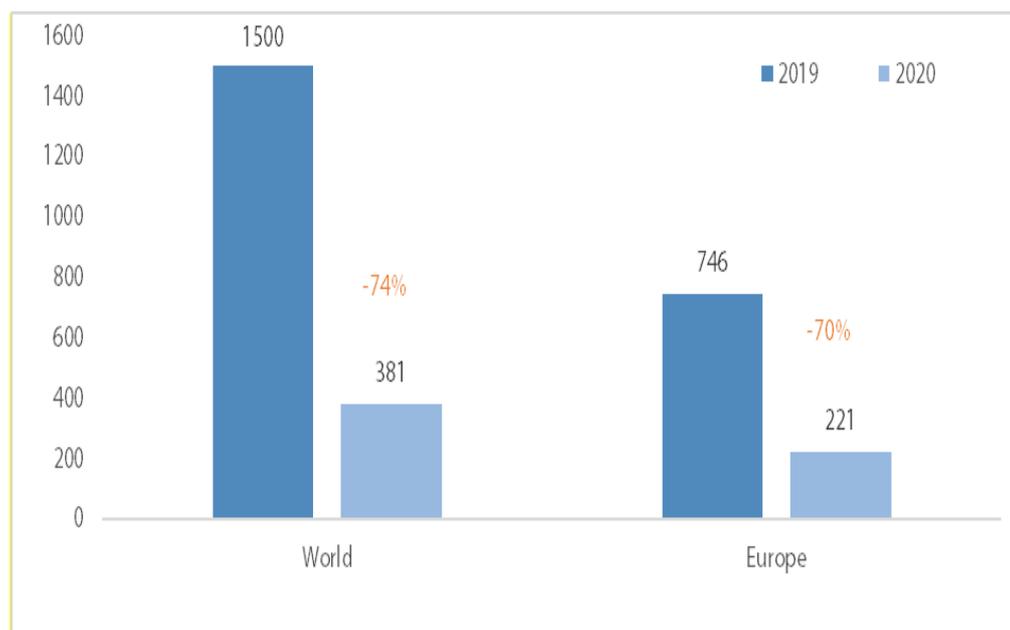
The European Agenda for Tourism 2030/2050 should provide **clear guidelines** for Member States and regions on the emerging digital skills and competences needed for a consistent digital transformation in the tourism sector. A dialogue between authorities has to be established in order to implement this European Agenda.

This Agenda should also provide **guidelines for the industry's sustainable transition** and suggest actions to mitigate the climate emergency.

Key areas for action

1. Develop an EU Tourism Strategy and rethink EU tourism competence.
2. Improve EU capacity to manage tourism.
3. Create a Single Tourism Market and Harmonize travel protocols.
4. Support Destination Management Organizations to facilitate tourism transition process.
5. Better leverage from the Recovery and Resilience Facility (RRF) and the Multiannual Financial Framework (MFF)
6. Support measures to preserve and promote tourism employment.
7. Create a European Tourism Data Space and build tourism employees' digital skills.

Figure : International tourist arrivals, million tourists



Source: : [UNWTO \(2021\)](#).

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