

Targeted consultation for an EU Sustainable Tourism Strategy

Fields marked with * are mandatory.

1 Introduction

In an era where the European ideal faces significant challenges, tourism (1) plays a vital role by fostering mutual understanding, social and territorial cohesion, and economic growth (2). After weathering the massive disruptions of the COVID-19 pandemic, tourism in Europe surged to record levels in 2024, surpassing pre-pandemic numbers. However, despite the sector's proven resilience and strong recovery, tourism faces significant challenges, including extreme weather events, unbalanced development and economic and social pressures related to its acceptance by local communities and rising costs for businesses, travellers and residents alike, difficulties in recruiting workforce and filling gaps in the sector.

These concerns call for a new EU-level strategy for sustainable tourism. It will be in line with the priorities and mandate of the European Commission, in particular for prosperity and competitiveness, supporting the sustainability, competitiveness and innovation of the single market, highlighting the social and economic benefits of tourism, and its inter-connections with other sectors. It should also place the European Union as a key player in shaping policy actions at global level.

The new strategy will build on the Transition Pathway for Tourism (TTP) and the European Agenda for Tourism 2030 (3), while addressing a number of challenges and priorities which have become prominent in recent years.

This survey aims to consult all stakeholders in the tourism ecosystem as regards the new strategy, including key priorities and concrete actions for various actors, such as EU institutions; national, regional and local authorities; the private sector and civil society.

Please take a few minutes of your time to help us shape the future of EU tourism together.

(1) The EU industrial policy defines tourism as one of the 14 industrial ecosystems, where value is built through several inter linked economic sectors: Passenger transport (air, land, water); Accommodation and food service activities; Travel agency, tour operator and reservation activities; Creative, arts, entertainment, cultural, sports and recreative activities; Office administrative activities and horizontal activities such as Water collection and treatment. This ecosystem is strongly linked to other industrial ecosystems, especially Mobility, Cultural and Creative Industries, Digital, Agri Food, Retail and Proximity and social economy.

(2) Tourism generated an estimated €764 billion gross value added in 2023, or 5.1 % of the total gross value added in the EU economy. €269 billion correspond to international tourism exports, meaning 21% of the total EU trade revenue. Tourism supports 17,4 million jobs in the EU, which is 8,24% of the total workforce in 2022. EU tourism ecosystem included 4.5 million companies in 2023, 99.9% of them being SMEs.

(3) The [Transition Pathway for Tourism](#) is a policy framework jointly created by the Commission and tourism stakeholders detailing key actions, targets and conditions to achieve the green and digital transitions and long-term resilience of the sector. It was endorsed by EU Ministers through the Council's adoption of the [European Agenda for Tourism 2030](#).

2 Methodology

You are invited to engage in this process by sending your input through this online survey.

Based on the survey results and further meetings with stakeholders, the EU Strategy for Tourism will be co-created over the course of 2025.

This survey will be open until **15 August 2025**. You are, however, warmly encouraged to send your responses as soon as possible to facilitate early analysis.

In case of questions about this consultation, please send an email to MOVE-TOURISM@ec.europa.eu

3 About you

* I'm giving my contribution as

Maximum 1 selection

- ☐ a) Academic / Research institution
- ☒ b) Business association
- ☐ c) Company / Business

- ☐ d) Consumer organisation
- ☐ e) Destination management organisation
- ☐ f) Environmental organisation
- ☐ g) Equality and fundamental rights bodies
- ☐ h) Cultural (heritage) organisation
- ☐ i) EU institution
- ☐ j) EU citizen
- ☐ k) International organisation
- ☐ l) Healthcare / Wellbeing facility
- ☐ m) Network of organisations
- ☐ n) Non-governmental organisation (NGO)
- ☐ o) Local administration
- ☐ p) Regional administration
- ☐ q) National administration
- ☐ r) Local action group or association
- ☐ s) Regional/Local development agencies
- ☐ t) Trade union
- ☐ u) Other (specify)

*** What is your area of expertise in the tourism sector?**

Maximum 25 selection(s)

- ☐ a) Tourism services
- ☐ b) Sustainability/labelling
- ☐ c) Innovation
- ☐ d) Technology and digitalisation
- ☐ e) Statistics and data
- ☐ f) Consumer protection
- ☐ g) Gender rights and social inclusion
- ☐ h) Skills / Labour market
- ☐ i) Destination management
- ☐ j) Marketing and PR
- ☐ k) Organisation of events
- ☐ l) Mobility and transport
- ☐ m) River and sea tourism (cruise, boat rental, ports and marinas)
- ☐ n) HORECA
- ☐ o) Sport
- ☐ p) Culture and cultural heritage
- ☐ q) Media
- ☐ r) Accessibility
- ☐ s) Sustainable urban development
- ☐ t) Rural development
- ☐ u) Food production

- ☐ v) Longevity economy
- ☐ w) Health care / Wellbeing
- ☐ x) EU funding management
- ☒ y) Other (specify)

if other, please specify

Transport, regional aviation

*** Country of origin or of the headquarters of your network**

- ☐ Austria
- ☒ Belgium
- ☐ Bulgaria
- ☐ Croatia
- ☐ Cyprus
- ☐ Czechia
- ☐ Denmark
- ☐ Estonia
- ☐ Finland
- ☐ France
- ☐ Germany
- ☐ Greece
- ☐ Hungary
- ☐ Ireland
- ☐ Italy
- ☐ Latvia
- ☐ Lithuania
- ☐ Luxembourg
- ☐ Malta
- ☐ Netherlands
- ☐ Poland
- ☐ Portugal
- ☐ Romania
- ☐ Slovak Republic
- ☐ Slovenia
- ☐ Spain
- ☐ Sweden
- ☐ Other country

Areas of Europe

Maximum 2 selection(s)

- ☐ Western Europe

- ☐ Eastern Europe
- ☐ Northern Europe
- ☐ Southern Europe
- ☐ Central Europe
- ☐ Mediterranean
- ☐ Atlantic
- ☐ Baltic Sea
- ☐ Black Sea
- ☐ Outermost region
- ☒ Other (specify)

Please specify

EU

Territorial level of expertise/activities

Maximum 1 selection

- ☐ Rural areas
- ☐ Remote areas
- ☐ Mountainous areas
- ☐ Rivers / inland waterways
- ☐ Coastal areas or open seas
- ☐ Islands
- ☐ Urban areas
- ☒ Other (specify)

Please specify

Remote, peripheral and outermost regions

Your information

* First name

Laura

* Surname

Kancel

* Email

This will not be published

laura.kancel@eraa.org

*** Name of your organisation / network**

European Regions Airline Association (ERA)

Role / position in the organisation

Policy Officer

*** Please indicate the size of your organisation**

- ☐ **Micro** (1 to 9 employees)
- ☒ **Small** (10 to 49 employees)
- ☐ **Medium** (50 to 249 employees)
- ☐ **Large** (250 or more employees)

Your transparency register number (if applicable)

4 Publication of information

The Commission will publish all contributions to this consultation. Please do not include any confidential information in your reply. You can choose whether you would prefer to have your personal details published or to remain anonymous when your contribution is published. **For the purpose of transparency, the type of respondent (e.g., 'EU citizen', 'commercial company' or 'consumer organisation'), country of origin, organisation name and size, and its transparency register number, are always published.** Your e-mail address will never be published.

☒ I agree with the [personal data protection provisions](#)

5 Targeted consultation questions

You may choose which questions you answer and leave others empty. Please, where you can, propose concrete actions and targets. Quantifiable evidence is very much welcome.

- 5.1 General comments
- 5.2 Environmental sustainability and climate action
- 5.3 Social sustainability
- 5.4 Increased resilience of DMOs
- 5.5 Digital transformation
- 5.6 Smart tourism
- 5.7 Accessibility and inclusiveness

- 5.8 Competitiveness and support MSMEs and start-ups
- 5.9 Skills and support to the workforce
- 5.10 Modes of transport
- 5.11 A shared brand for Europe
- 5.12 Final thoughts

5.1 General comments

5.1.1 How familiar are you with the EU's Transition Pathway for Tourism and/or the European Agenda for Tourism 2030?

Maximum 1 selection(s)

- ☒ a) Very familiar – I actively engage with EU tourism policies.
- ☐ b) Somewhat familiar – I have read about it but not deeply involved.
- ☐ c) Not very familiar – I have heard of it but don't know the details.
- ☐ d) Not at all familiar – This is my first time hearing about it.

5.1.2 If you answered (a) or (b) what additional or different issues and actions, compared to those already identified in the Transition Pathway for Tourism and European Agenda for Tourism 2030, would you propose to be ambitiously considered for the development of a sustainable tourism ecosystem?

2000 character(s) maximum

Regional aviation will play an essential role in the decarbonisation of air transport by enabling the use of Sustainable Aviation Fuels in order to reduce CO2 levels with existing fleets, and at the same time being at the forefront of fleet renewal with radical new technologies. Regional airlines will be the first movers in commercial aviation when it comes to implementing new technologies, notably with new methods of propulsion which are more suitable for shorter distances, including to access remote touristic destinations. However, achieving a successful and competitive energy transition requires strong policy actions as well as ambitious industrial and funding policies to support and protect regional airlines which have lower revenue per passenger. Emissions reduction should be addressed through targeted financial measures notably by using revenues from the EU Emissions Trading System. Overall, funding applications should be made easier and more accessible to regional actors, and, more importantly, such funds should strategically combine with national funds to create maximum benefits. In the private sector, investing in aviation technology is today totally unclear and many are reluctant to invest. This is why we need strong initiatives by financial actors to finance the scale-up of new technologies, as well as further involvement in aviation by institutions such as the European Investment Bank. European airlines operate in a highly competitive market, where unilateral regulatory costs have significantly increased the cost of flying which places a heavy financial burden on the EU regional aviation sector, especially on those who operate with low margins. The EU should refrain from adopting measures that place a disproportionate financial burden on regional airlines. This would not only undermine their competitiveness but also risk higher prices for consumers, traffic diversion, carbon relocation, and reduced attractiveness of the EU as a touristic destination.

5.1.3 Which of the following areas do you believe should be a top priority for EU tourism policy moving forward?

a) Environmental sustainability, in particular:

Maximum 2 selection(s)

- ☐ a) Mitigating impacts on the environment, such as reducing waste production and pollution as well as air pollutants and noise, efficient use of resources (e.g. water, energy, soil)
- ☐ b) Protecting biodiversity and preventing degradation of natural habitats and ecosystems
- ☐ c) Active regeneration of natural environment, contributing to its restoration
- ☐ d) Sustainable travel modes and emission reductions
- ☐ e) Sustainable production and consumption
- ☐ f) Energy efficiency in accommodation services
- ☐ g) Water availability and water efficiency, including water saving and reuse
- ☐ h) Adaptation to climate change, including for example nature-based solutions, preparedness to extreme weather events and changing ways and seasons of travel
- ☒ i) Other (specify)

if other, please specify

Financial support for the decarbonisation of the aviation sector

b) Social sustainability, in particular:

Maximum 2 selection(s)

- ☐ a) Addressing unbalanced tourism development and its impacts on local communities (i.e. overcrowded destinations and destinations that could benefit from tourism)
- ☐ b) Tourism model that contributes to the wellbeing of host communities and involves them in decision-making
- ☐ c) Contribution to local communities' social and public infrastructure and offer through targeted support
- ☐ d) Strengthening rural-urban synergies
- ☒ e) Other (please specify)

if other, please specify

Strengthening regional connectivity to provide vital links and support to Europe's regions, promoting social and territorial equality and cohesion.

c) Digital transition, in particular:

Maximum 2 selection(s)

- ☐ a) Fostering collaboration and networking through the creation of clusters for innovation co-creation, pilot projects, and exchange of best practices
- ☐ b) Promote the adoption of the European Digital Identity to simplify the tourism experience and foster interoperability and innovation
- ☐ c) Enhancing data-driven tourism by means of supporting data access, sharing and management
- ☐ d) Enhancing data-driven tourism by means of supporting innovation through targeted funds and accompanying measures
- ☐ e) Supporting digital upskilling and capacity building for start-ups, SMEs and Destination Management Organizations (DMOs)
- ☐ f) Supporting start-ups, SMEs and DMOs accessing tools and technologies

- ☐ g) Other (specify)

d) Accessibility and inclusiveness, in particular:

Maximum 2 selection(s)

- ☐ a) Ensuring tourism is available and accessible to diverse travel groups, such as families, persons with disabilities, individuals with medical needs, young people, the elderly (and their caretakers where necessary), the LGBTQ+ community, and that it caters to their specific needs
- ☐ b) Contributing to the safety of vulnerable groups, such as female travellers, ethnic minorities and the LGBTQ+ community
- ☐ c) Designing experiences that are accessible to people across income levels, including reduced ticket prices, family discounts, youth passes, or inclusive packages
- ☐ d) Other (please specify)

e) Boosting competitiveness and support to businesses, in particular:

Maximum 2 selection(s)

- ☐ a) Enhancing support to businesses, in particular start-ups and MSMEs
- ☒ b) Reducing administrative burden and red tape for business
- ☐ c) Lowering barriers within the Single Market
- ☐ d) Encouraging workforce mobility by lowering barriers with respect to regulated professions such as tour guides, ski instructors
- ☒ e) Simplification of access to funding
- ☐ f) Enhancing information sharing via the [EU Tourism Platform](#), set up by the European Commission to collect all useful information on actions, projects, policies and funds for the EU tourism ecosystem by interested stakeholders
- ☐ g) Promoting green, digital, business and financial skills
- ☐ h) Better coordination of policies at EU and national level
- ☐ i) Other (please specify)

f) Skills development and support to the workforce, in particular:

Maximum 2 selection(s)

- ☐ a) Upskilling and reskilling the tourism workforce
- ☐ b) Ensuring regular and strategic training opportunities for all echelons of the workforce
- ☐ c) Ensuring fair and attractive working conditions for all workers, including for the most vulnerable groups such as persons with disabilities and with medical needs
- ☒ d) Supporting SMEs in receiving and providing training opportunities
- ☐ e) Other (please specify)

g) Increased resilience for the sector, in particular:

Maximum 2 selection(s)

- ☐ a) Ensuring that existing or new tools under crisis-response framework accommodate the needs of the tourism sector in case of serious disruptions (natural, human-induced, health-related and other disasters)

- ☐ b) Adapting to climate change impacts on tourism (shifting travel patterns, shifting services (e.g. winter tourism), changing water availability and demand, infrastructure and heritage protection, forecasting, planning and preparedness)
- ☒ c) Mitigating seasonality, high/over dependence on tourism and impact on local communities and ecosystems of some destinations, thus promoting the diversification of destinations
- ☐ d) Ensuring increased focus on sustainable forms of tourism that do not impact the ecological, climate and water systems
- ☐ e) Promote skilling/reskilling and upskilling for the key stakeholders of tourism, from low-skilled workers to middle and top managerial level, providing training sessions on resilience and sustainability
- ☐ f) Data-based decision making which includes strategic foresight and updated global tourism trends
- ☐ g) Fostering multilevel and multistakeholder governance for more resilient and sustainable tourism management models
- ☐ h) Other (specify)

h) A shared brand for Europe as a destination, in particular:

Maximum 2 selection(s)

- ☐ a) Positioning Europe as a leader in socially and environmentally sustainable tourism
- ☐ b) Showcasing Europe's rich history, culture, cultural heritage, arts, crafts and traditions as a unique selling point
- ☐ c) Promoting immersive, community-driven tourism beyond well-known major cities and destinations
- ☒ d) Highlighting Europe's well-connected transport network for easy cross-border travel
- ☐ e) Branding Europe as a hub for digital and tech-driven travel experiences
- ☐ f) Reinforcing Europe's reputation as a safe, high-quality destination for all travellers
- ☐ g) Other (please specify)

5.2 Environmental sustainability and climate action

5.2.1 What are key areas where EU should focus in addressing climate mitigation and environmental protection in tourism?

Maximum 2 selection(s)

- ☐ a) Reducing transport emissions and supporting sustainable travel modes
- ☐ b) Stepping up circularity actions (resource efficiency such as energy and water efficiency, waste and pollution reduction)
- ☐ c) Contributing to the protection of biodiversity, restoring the environment
- ☐ d) Sustainability knowledge: boosting business awareness, training and skills, facilitating research and innovation
- ☐ e) Metrics: data, proposing core sustainability indicators, supporting sustainability schemes of destinations
- ☐ f) Sustainable consumption: addressing consumer demand, green procurement, awareness raising of environment-friendly choices, promoting longer stays
- ☒ g) Other (please specify)

If other, please specify

Financial support for the decarbonisation of the aviation sector

5.2.2 How can the EU most effectively support the green transition in tourism while ensuring business competitiveness?

Maximum 2 selection(s)

- ☐ a) Through public procurement supporting “sustainable” choices
- ☐ b) Enhancing support and incentives for SMEs and destinations to adopt sustainable practices, including the registration to environmental management schemes or the certification with reliable ecolabels (e.g. financial support, technical assistance, and capacity-building initiatives)
- ☐ c) Promoting among young people a sustainable way of travelling, such as with DiscoverEU (an Erasmus+ action)
- ☐ d) Promoting sustainable forms of tourism such as eco-tourism, nature-based tourism and agri-tourism
- ☐ e) Promoting consumer awareness on sustainable tourism choices, including reliable ecolabels
- ☐ f) Investing in research and innovation projects for environmental-, water- and climate-friendly tourism
- ☒ g) Other (specify)

If other, please specify

Refrain from adopting measures that place a disproportionate financial burden on regional airlines (e.g. additional taxes on aviation, full content sharing obligations etc).

5.2.3 How should the EU improve travel to destination and mobility within a destination, while ensuring environmental sustainability?

Maximum 1 selection(s)

- ☐ a) Improve rail connectivity, infrastructure and other multimodal transport options across regions and across Europe
- ☐ b) Support programmes and initiatives to expand and promote the use of electric cars
- ☐ c) Increase investment in active mobility (walking, cycling) infrastructure and services, such as bicycle sharing schemes
- ☐ d) Implement a unified EU-wide digital ticketing system for public and private transport
- ☒ e) Increase investment in sustainable transport fuels to support carbon-neutral travel
- ☐ f) Improve connectivity to remote, rural areas, islands, mountainous areas, the outermost regions, while at the same time incentivising sustainable mobility
- ☐ g) Other (specify)

5.2.4 How can water saving and water efficiency be promoted in tourism?

Maximum 1 selection(s)

- ☐ a) Promoting tourism activities that match the local environmental context and do not contribute to water stress and competition for limited water resources
- ☐ b) Promoting seasonal tourism to avoid peak demand of water in periods of shortages
- ☐ c) Water-sensitive and efficient tourism infrastructure for accommodation, leisure and transport
- ☐ d) Enhancing water awareness of tourists to reduce consumption
- ☐ e) Supporting water restoration projects to restore the broken water cycle
- ☐ f) Promote innovative solutions such as water reuse, rainwater harvesting, water filtering, auditing, metering and leakage control

5.2.5 Biodiversity plays a critical role in enabling tourism and recreation. It provides the green spaces for visitors and locals to explore, to educate, and to nurture their health and wellbeing. Biodiversity also mitigates the impacts of climate change, ensuring the resilience of natural environment on which tourism thrives. However, tourism also impacts biodiversity, in some cases contributing to changes in species populations, habitat loss, and overall ecosystem degradation. In your opinion, how can EU help strike the right balance between nature conservation and sustainable tourism & recreation?

Maximum 1 selection(s)

- ☐ a) Monitoring the habitat alteration, wildlife disturbances and spread of invasive species due to tourism-related activities
- ☐ b) Introducing harmonised metrics to measure biodiversity footprint for tourism industry and foster a common methodology
- ☐ c) Incentivising and promoting good practice and use of national and regional schemes, promoting the European standards (e.g. the use of Natura 2000 label)
- ☐ d) Promoting education in biodiversity for visitors through EU programmes and awareness communication campaigns
- ☐ e) Supporting programmes on the restauration of ecosystems and biodiversity conservation
- ☐ f) Other (specify)

5.2.6 To promote sustainable consumption in the tourism sector, consumers and organisations have the possibility to make environment-friendly choices, for example through the EU Ecolabel - the official EU voluntary label for environmental excellence. In your opinion, how can the EU Ecolabel further support sustainable consumption in the tourism sector?

Maximum 1 selection(s)

- ☐ a) Through broader promotion of the existing EU Ecolabel criteria for tourist accommodations
- ☐ b) Through the development of new EU Ecolabel criteria for restaurants/food services
- ☐ c) Through more extensive use of the EU Ecolabel in public procurement
- ☐ d) By reflecting the outermost regions' specificities
- ☐ e) Other (please specify)

5.2.7 Traditionally, tourism actors have focused on minimising their negative impact on the environment. However, tourism has an opportunity to go a step further and increase its positive impact on the environment, regenerating it. Activities can be as simple as cleaning litter from land and waters, harvesting alien species, or more complex like restoring natural ecosystem. Regenerative tourism would contribute to putting a more positive light and better acceptance of tourism ecosystem. How can EU contribute to implementing this opportunity?

Maximum 1 selection(s)

- ☐ a) Provide comprehensive EU guidelines for destinations and businesses how to implement environmentally positive tourism practices
- ☐ b) Support destinations and businesses in measuring positive tourism impact
- ☐ c) Incentivize regenerative tourism actions through EU funding, technical assistance to the destinations
- ☐ d) Facilitate peer learning and sharing good practice

- ☐ e) Other (please specify)

If you have good practice examples, please share in section 5.12 (Final thoughts)

5.3 Social sustainability

5.3.1 How can the EU support emerging and less visited regions in ensuring balanced tourism development that benefits all?

Maximum 2 selection(s)

- ☐ a) Providing support and capacity building for less known Destination Management Organisations (DMOs) with strong tourism potential (e.g. in underdeveloped, remote or rural areas) to attract visitors
- ☐ b) Launching an EU-wide diversification strategy that combines marketing campaigns, supports local, regional and national efforts to develop a wide range of tourism products/services and capacity building to promote off-season and lesser-known destinations
- ☐ c) Encouraging community-driven tourism initiatives by supporting local businesses, including local food products, cooperatives, social innovation and cultural heritage projects
- ☐ d) Promoting and supporting young people travelling to Europe to explore and learn about Europe's diversity, its cultural heritage and history
- ☐ e) Support lesser-known destinations in attracting a diverse range of types of visitors, including digital nomads
- ☐ f) Support the outermost regions in promoting balanced tourism development through a comprehensive approach that leverages their unique assets and constraints
- ☒ g) Other (specify)

If other, please specify

Ensure sustained connectivity and promote lesser-know destinations.

5.3.2 What is the most effective way the EU can leverage data to promote more balanced and sustainable tourism across regions?

Maximum 1 selection(s)

- ☐ a) Provide targeted support to local and regional authorities to apply data and digital tools for managing tourism sustainably
- ☐ b) Develop and promote clear guidelines on effective tourism regulation to help manage visitor flows, especially in high-pressure destinations
- ☐ c) Encourage meaningful involvement of local communities in tourism planning and management through data-informed and participatory decision-making
- ☐ d) Strengthen the implementation of accessibility standards, with a focus on under-visited rural and remote areas
- ☐ e) Create EU-wide sustainability indicators, such as a tourism social acceptance index, to guide balanced development
- ☐ f) Other (please specify)

5.3.3 What actions could be undertaken at EU level to better support individuals undertaking extended stays in EU regions - such as digital nomads, silver tourism participants, diaspora

tourists reconnecting with their roots, or participants in cultural and educational exchanges?

Maximum 1 selection(s)

- ☐ a) Supporting regions wishing to become long-term stay hubs by offering targeted funding, training, and best practice sharing to help develop infrastructure and services, cultural integration services, and access to basic services such as healthcare and housing
- ☐ b) Establishing common standards for remote and rural hubs at EU level
- ☐ c) Providing a comprehensive, multilingual one-stop shop, via the [EU Tourism Platform](#), offering information on visa/residency options, local integration programs, digital infrastructure, cost of living comparisons, and community networks
- ☐ d) Other (specify)

5.3.4 How can the EU help destinations improve community engagement and address resident concerns about tourism?

Maximum 2 selection(s)

- ☐ a) Promoting co-creation of tourism strategies by encouraging DMOs to work closely with local communities
- ☐ b) Providing funding for awareness campaigns that highlight the value of sustainable tourism for residents
- ☐ c) Supporting policies that address tourism-related pressures on housing, public spaces, environment and local services
- ☐ d) Helping improve local and regional tourism planning processes through impact assessments
- ☐ e) Developing EU-level tools to measure and monitor tourism's social and economic impact on communities
- ☐ f) Showcasing economic benefits of tourism through communicating the financial contribution of visitors to local projects
- ☐ Other (please specify)

5.3.5 Authenticity is increasingly important in tourism, but what are the most effective ways tourism operators can support and enhance authentic experiences?

Maximum 1 selection(s)

- ☐ a) Focus on using traditional aesthetics and symbols, even if they're recreated or staged, to meet tourist expectations.
- ☐ b) Collaborate with local communities, involve and empower residents in storytelling, support local artisans and food producers, and protect cultural and natural heritage.
- ☐ c) Rely on digital influencers and marketing strategies to present destinations as "authentic"
- ☐ d) Standardize experiences across destinations to ensure consistency and predictability for visitors.
- ☐ e) Other (please specify)

5.3.6 Destinations working together - for example, through cultural heritage or gastronomy routes - can offer richer, more compelling visitor experiences. In your view, what are the most effective ways to support this kind of collaboration?

Maximum 2 selection(s)

- ☐ a) Develop joint marketing and storytelling strategies that highlight the shared themes and unique contributions of each destination
- ☐ b) Create shared booking, ticketing, or information platforms to make multi-destination experiences easy and seamless for visitors

- ☐ c) Encourage cooperation between local authorities, DMOs, businesses, farmers and food producers, and guides across destinations to deliver consistent quality and authentic experiences
- ☐ d) Align local, regional and territorial cooperation policies, funding, and infrastructure and services planning to support the long-term sustainability of cross-destination initiatives
- ☐ e) Offer training and capacity-building for destination managers and stakeholders to foster a collaborative mindset and build practical skills for partnership working
- ☐ f) Other (please specify)

5.4 Increased resilience of Destination Management Organisations (DMOs)

5.4.1 Given the economic and geopolitical uncertainties affecting tourism, what concrete steps should the EU take to strengthen its resilience and position itself as a safe tourism destination?

Maximum 2 selection(s)

- ☐ a) Strengthening EU-wide travel safety measures and consumer protection laws and rules enforcement / surveillance
- ☐ b) Promote the EU more effectively as a safe and welcoming destination for travellers
- ☐ c) Supporting cross-border cooperation agreements to facilitate safe and seamless travel
- ☒ d) Focusing measures on boosting domestic and intra-EU travel
- ☐ e) Focus promotion of Europe as a destination also on developing markets, in addition to the traditional ones
- ☐ f) Other (please specify)

5.4.2 What measures would most effectively strengthen the resilience of the EU destinations in the face of future crises?

Maximum 2 selection(s)

- ☐ a) Establishing an EU-wide crisis-response framework for tourism-related disruptions (e.g. pandemics, natural disasters, geopolitical events)
- ☒ b) Enhancing cross-border coordination among Member States for managing travel restrictions and emergency response
- ☐ c) Providing support for DMOs to develop and implement crisis preparedness and risk mitigation and management plans
- ☐ d) Encouraging diversification of tourism offerings, including rural, cultural, wellness, and off-season tourism development
- ☐ e) Other (please specify)

5.4.3 What is the most critical challenge DMOs face in managing tourism in a sustainable and balanced way?

Maximum 1 selection(s)

- ☐ a) Insufficient financial and human resources to design and implement effective strategies
- ☐ b) Limited access to reliable data and digital tools for evidence-based planning
- ☐ c) Insufficient opportunities for collaboration and peer learning with other DMOs
- ☐ d) Restricted authority to influence or regulate tourism flows and impacts
- ☐ e) Inadequate integration with broader EU, national, regional and local policy frameworks
- ☐ f) Low community participation in tourism-related decision-making

- ☐ g) Other (please specify)

5.4.4 How should the EU best support DMOs in addressing unbalanced tourism growth?

Maximum 2 selection(s)

- ☐ a) Establishing an EU-wide peer-learning and technical assistance mechanism for DMOs
- ☒ b) Providing targeted financial support for smaller destinations to enhance sustainability initiatives
- ☐ c) Developing an EU index of social acceptance for tourism flows to guide policymaking
- ☐ d) Promoting collaboration between DMOs and urban planning and local transport authorities
- ☐ e) Expanding best-practice sharing networks
- ☐ f) Other (please specify)

5.4.5 How can DMOs best manage and benefit from business tourism and MICE (Meetings, Incentives, Conferences, and Exhibitions)?

Maximum 2 selection(s)

- ☐ a) Establishing effective governance structures with other relevant administrations and the stakeholder ecosystem at destination
- ☐ b) Linking business tourism to the general promotion of the destination
- ☐ c) Targeted promotion and incentives for MICE organisers
- ☐ d) Integrating and promoting corporate sustainability requirements
- ☐ e) Ensuring legacy of business events, by enhancing long-term impact in local communities
- ☐ f) All of the above
- ☐ g) Other (please specify)

5.5 Digital transformation

5.5.1 What is the main barrier preventing better data-driven decision-making in the tourism sector?

Maximum 1 selection(s)

- ☐ a) Lack of a mechanism for data sharing across borders and sectors at EU level
- ☐ b) Lack of standardized and comparable tourism data across EU Member States
- ☐ c) Limited access to real-time tourism data for SMEs and DMOs
- ☐ d) Insufficient digital skills among tourism professionals to leverage data for decision-making
- ☐ e) Costs associated with implementing and maintaining data collection systems
- ☐ f) Lack of adequate indicators to measure environmental and social sustainability.
- ☐ g) Low granularity and/or timeliness of tourism statistics
- ☐ h) Other (please specify)

5.5.2 What is the most effective strategy to accelerate the digital transformation of tourism businesses, particularly SMEs?

Maximum 2 selection(s)

- ☐ a) Expanding access to networks such as the European Enterprises Networks (EEN) or Digital Innovation Hubs (DIHs) for mentorship and capacity building Providing targeted funding or grants for digital tools and infrastructure

- ☐ b) Facilitating access to affordable and user-friendly digital solutions
- ☐ c) Showcasing best practices and successful digital transformation case studies
- ☐ d) Encouraging collaboration between tourism businesses and tech providers
- ☐ e) Simplifying regulations and providing clear guidelines on digital compliance (e.g. data protection, e-commerce)
- ☐ f) Promoting interoperability and compatibility across digital platforms leveraging the usage of the European digital identity framework and digital travel credentials
- ☐ g) Better inclusion of digital skills as part of secondary/compulsory education, and/or offering digital skills training and mentoring for tourism entrepreneurs and staff
- ☐ h) Other (please specify)

5.5.3 What do you consider the most promising innovation trends in the tourism sector?

Maximum 1 selection(s)

- ☐ a) Personalised and AI-driven travel experiences (ie. use of AI and machine learning to tailor recommendations, itineraries, and customer service based on individual preferences and behaviour)
- ☐ b) Innovative tourism solutions in sustainability and regeneration (such as plastic-free hotels, energy efficient buildings, electric shuttles, which also build on new technologies and science)
- ☐ c) Immersive technologies (ie. virtual and augmented reality experiences for pre-trip previews, virtual tours, or historical reconstructions at destinations)
- ☐ d) Smart destinations and IoT integration (ie. use of Internet of Things (IoT) for real-time crowd monitoring, smart signage, digital twins of cities, and enhanced visitor flow management)
- ☐ e) Using the European Digital Identity Wallets and the upcoming European Business Wallets to establish a trusted digital infrastructure that supports interoperability between reservation systems and digital travel credentials, enabling more seamless, secure, and efficient passenger and tourists flows.
- ☐ f) Remote work and digital nomad infrastructure (ie. innovations catering to the growing digital nomad segment - like co-living platforms, work-friendly travel packages, or visa-tech services)
- ☐ g) Other (please specify)

5.5.4 How is your organization currently collaborating with other actors in the tourism ecosystem (e.g. public sector, private businesses, tech providers, academia, civil society)?

Maximum 7 selection(s)

- ☒ a) We are part of formal partnerships, clusters, or networks at local, national, or EU level
- ☐ b) We collaborate on joint projects or pilots (e.g. digital, sustainability, visitor experience)
- ☐ c) We participate in knowledge-sharing events (workshops, webinars, innovation labs)
- ☐ d) We contract or subcontract services from digital or tourism solution providers
- ☐ e) We are open to collaboration but have not yet established active partnerships
- ☐ f) We do not currently engage in collaboration
- ☐ g) Other (please specify)

5.5.5 How prepared is your organization or territory to integrate sustainability metrics into tourism decision-making?

Maximum 1 selection(s)

- ☐ a) Very prepared – we already track environmental, social, and economic sustainability

- ☐ b) Somewhat prepared – we are developing or adapting sustainability indicators
- ☐ c) Not yet prepared – but we recognize the importance and plan to address it
- ☐ d) Not a priority at the moment
- ☐ e) Other (please specify)

5.5.6 What are the main factors that limit the scalability of innovative solutions across destinations or regions?

Maximum 2 selection(s)

- ☐ a) Fragmentation of regulations or administrative procedures
- ☐ b) Lack of interoperability or common standards for digital tools
- ☐ c) Limited visibility or adoption of successful pilots
- ☐ d) Cultural or operational differences between destinations
- ☐ e) Difficulty accessing cross-border funding or support
- ☐ f) Other (please specify)

5.6 Smart tourism

5.6.1 Smart tourism responds to new challenges and demands in a fast-changing sector, including the evolution of digital tools, products and services; equal opportunity and access for all visitors; sustainable development of the local area; and support to creative industries, local talent and heritage [source: [European Capital of Smart Tourism - European Commission](#)]

How familiar are you with this concept?

Maximum 1 selection(s)

- ☐ a) Very familiar – as a destination, we are actively implementing smart destination strategies / as a business, my company offers targeted solutions to destinations to support smart tourism
- ☐ b) Somewhat familiar – we are exploring or planning related initiatives
- ☒ c) Heard of it – but not sure how it applies or could apply to our operations
- ☐ d) Not familiar at all

5.6.2 What is the biggest challenge to becoming a smart destination?

Maximum 2 selection(s)

- ☐ a) Establishing effective governance structures
- ☐ b) Ensuring sustainable funding and resource allocation
- ☐ c) Integrating and adapting to advanced technologies
- ☐ d) Building robust networks and stakeholder engagement
- ☐ e) All of the above
- ☐ f) Other (please specify)

5.6.3 What kind of support from the EU would most help your organization engage with or develop as a smart destination?

Maximum 2 selection(s)

- ☐ a) Training and capacity-building programs

- ☐ b) Funding for digital infrastructure and innovation
- ☐ c) Access to best practices and case studies
- ☐ d) Technical assistance or consultancy
- ☐ e) Networking opportunities with other smart destinations
- ☐ f) A common EU standard and definition of smart destination to use as a reference and as a label
- ☐ g) Other (please specify)

5.6.4 What type of partnerships or collaborations would be most valuable to your organization in advancing smart tourism initiatives?

Maximum 2 selection(s)

- ☐ a) Partnerships with local authorities or destination managers
- ☐ b) Collaborations with tech providers and digital solution experts
- ☐ c) Connections with academic or research institutions
- ☐ d) Engagement with cultural and creative industries
- ☐ e) Involvement with citizen and community groups
- ☐ f) Other (please specify)

5.6.5 As a public authority or SME/start-up, what barriers have you encountered in participating in smart tourism projects?

Maximum 2 selection(s)

- ☐ a) Lack of awareness of available opportunities
- ☐ b) Limited internal capacity or expertise
- ☐ c) Bureaucratic or administrative complexity
- ☐ d) Difficulty forming cross-sector or cross-border partnerships or urban-rural synergies
- ☐ e) Insufficient access to data or digital tools
- ☐ f) Other (please specify)

5.7 Accessibility and inclusiveness

5.7.1 Accessibility in tourism means creating inclusive experiences for everyone — including people with physical, cognitive, sensory, and communication needs. What are the two most effective actions that can be taken (at local, regional, national, or EU level) to improve accessibility in tourism?

Maximum 2 selection(s)

- ☐ a) Invest in accessible infrastructure, services and mobility solutions - such as step-free access, tactile signage, and quiet/sensory-friendly spaces - across public areas and tourism sites
- ☐ b) Offer training for tourism professionals on inclusive service delivery, including communication techniques for interacting with people with diverse needs
- ☐ c) Create and promote interconnected digital accessibility tools - like accessible websites, easy-read guides, multilingual support, and booking platforms that list accessibility features
- ☐ d) Create a one-stop shop at EU level for accessibility-related matters in destinations

- ☐ e) Develop inclusive wellness and health tourism services (e.g. accessible spas, mental health retreats, and medical tourism that accommodates a range of physical and cognitive needs)
- ☐ f) Launch or scale up national and EU-wide guidance schemes to help destinations and SMEs improve and showcase their accessibility standards
- ☐ g) Improve the accessibility of cultural heritage sites, both physical and digital, including smaller and lesser-known sites in remote and rural areas
- ☐ h) Facilitate the cooperation between relevant tourism stakeholders, representatives of persons with disabilities, and equality bodies in decision-making regarding the design, implementation, monitoring and evaluation of tourism offer and management
- ☐ i) Other (please specify)

5.7.2 Safety is a key factor in creating inclusive and welcoming travel experiences — especially for LGBTQ+ travellers and solo female travellers, who may face additional risks. In your view, what are the two most effective ways the tourism industry can enhance safety and confidence for these groups?

Maximum 2 selection(s)

- ☐ a) Provide training for local authorities, tourism and hospitality staff on inclusive service, unconscious bias, and how to respond to discrimination or harassment
- ☐ b) Promote destinations, businesses, and experiences that are certified or verified as safe and inclusive for LGBTQ+ and solo female travellers
- ☐ c) Improve access to clear, accurate information about local laws, cultural norms, and safety tips on platforms and at points of booking
- ☐ d) Design and promote women-led or LGBTQ+-led tours and experiences, creating trusted spaces and peer support
- ☐ e) Partner with local authorities to improve public safety measures in tourist areas, including better lighting, transport safety, and emergency response
- ☐ f) Other (please specify)

5.7.3 Families are an important part of the tourism ecosystem - and meeting their diverse needs can also help destinations tackle challenges like seasonality, environmental impact and social inclusion. In your opinion, what are the two most effective actions that could be taken (at local, regional, national, or EU level) to better support families traveling together and enhance the positive impact of tourism on communities?

Maximum 2 selection(s)

- ☐ a) Develop flexible, family-friendly infrastructure and services - such as stroller access, multi-generational accommodations, and safe spaces for children
- ☐ b) Provide affordable, high-quality childcare options that can serve both local residents and visiting families, including during off-peak seasons
- ☐ c) Promote inclusive experiences that reflect and welcome all types of families - including single parents, same-sex parents, and multigenerational households
- ☐ d) Design family-focused tourism offers that encourage off-season travel, such as school holiday programming, cultural activities, or nature-based adventures
- ☐ e) Ensure accessible, clear information and staff training to support respectful, welcoming service for all families - across languages, cultures, and needs

- ☐ f) Provide clear information - in an education mode adapted to families - on how to prevent environmental impact of tourism activities
- ☐ g) Provide a comprehensive, multilingual one-stop shop, via the EU Tourism Platform, offering information about the services available at destination and regional level
- ☐ h) Other (please specify)

5.8 Competitiveness, and support to Micro and Small and Medium Enterprises (MSMEs) and start-ups

5.8.1 What are the primary challenges preventing tourism SMEs from achieving long-term growth?

Maximum 2 selection(s)

- ☒ a) Limited access to financial resources, investment opportunities and funding
- ☐ b) Difficulties in adopting and integrating digital technologies
- ☒ c) Regulatory and administrative burdens at national and/or EU level
- ☐ d) Workforce shortages and lack of skilled employees
- ☐ e) Limited international market reach and networking opportunities
- ☐ f) Uneven playing field vis-à-vis other market players
- ☐ g) Barriers within the Single Market
- ☐ h) Other (please specify)

if (c) please list the burdens that are causing you problems?

The multiplication of regulations is imposing an administrative and financial burden on regional airlines which typically work on lower margins (e.g. cost of compliance with the Fit for 55 package, Regulation 2004/261, reporting requirements etc).

5.8.2 What should be the European Union's top priority to best support start-ups in the tourism sector?

Maximum 1 selection(s)

- ☒ a) Increase access to early-stage funding (e.g., grants, seed capital, venture support)
- ☐ b) Establish specialized incubators and accelerators for tourism innovation, and/or an EU track to access these support measures
- ☐ c) Simplify regulatory frameworks to ease market entry and innovation
- ☐ d) Facilitate cross-border collaboration and internationalization
- ☐ e) Invest in R&D and digital infrastructure for tourism start-ups
- ☐ f) Provide mentorship and entrepreneurial skills development
- ☐ g) No specific focus on start-ups is needed; general SME support is sufficient
- ☐ h) Other (please specify)

5.8.3 What is the biggest barrier preventing tourism SMEs from accessing EU funding and support programs?

Maximum 1 selection(s)

- ☐ a) Lack of awareness about available funding opportunities

- ☒ b) Complexity of application procedures and regulatory requirements
- ☐ c) Limited capacity to prepare competitive grant proposals
- ☐ d) Insufficient funding tailored specifically for small tourism businesses
- ☐ e) Difficulty in navigating multiple EU information sources
- ☐ f) Other (please specify)

5.8.4 What is the biggest barrier preventing tourism start-ups from accessing EU funding and support programs?

Maximum 1 selection(s)

- ☒ a) Lack of awareness about available EU programs and opportunities
- ☐ b) Complexity of application procedures and administrative burden
- ☐ c) Limited eligibility of tourism-specific or early-stage start-ups
- ☐ d) Difficulty meeting co-financing or matching fund requirements
- ☐ e) Lack of capacity or expertise to write competitive proposals
- ☐ f) Funding is too focused on traditional SMEs or large-scale projects
- ☐ g) Other (please specify)

5.8.5 How should the EU improve access to information and support for tourism SMEs and start-ups?

Maximum 2 selection(s)

- ☐ a) Expanding the EU Tourism Platform into a comprehensive one-stop-shop for all tourism stakeholders
- ☒ b) Further simplifying administrative procedures and lowering barriers under the upcoming Single Market Strategy
- ☐ c) Strengthening collaboration with Enterprise Europe Network (EEN) and Digital Innovation Hubs
- ☒ d) Providing more direct, hands-on technical assistance for SMEs on compliance and funding applications
- ☐ e) Other (please specify)

5.8.6 The recently published [Competitiveness Compass](#) identifies a number of structural weaknesses causing a persistent gap in productivity growth. With reference to the identified five horizontal enablers for competitiveness (simplifying administrative burden, lowering barriers to the Single Market, financing competitiveness, promoting skills and quality jobs & better coordinating policies at EU and national level), do you see any specific area for improvement for the tourism sector?

2000 character(s) maximum

5.9 Skills development and support to the workforce

5.9.1 What is the most pressing challenge for upskilling and reskilling the tourism workforce in alignment with the twin transition (green & digital)?

Maximum 1 selection(s)

- ☐ a) Lack of awareness about the importance of new skills for tourism workers
- ☒ b) Insufficient knowledge or understanding about funding available for businesses to invest in employee training
- ☐ c) Mismatch between training programs and actual industry needs
- ☐ d) Limited access to flexible learning opportunities (e.g., online courses, micro-credentials)
- ☐ e) Low participation from MSMEs in EU-wide upskilling and reskilling programmes
- ☐ f) Other (please specify)

5.9.2 How could the EU help MSMEs address workforce shortages and skills gaps in the tourism sector?

Maximum 2 selection(s)

- ☒ a) Establishing a Digital and Green Skills Academy to provide specialized training for tourism professionals and job seekers resulting in micro-credentials
- ☒ b) Increasing EU support for cross-border skills development programmes
- ☐ c) Encouraging apprenticeships and work-based learning for tourism roles as highlighted in the Union of Skills
- ☐ d) Supporting SME participation in B2B networking and recruitment events
- ☐ e) Other (please specify)

5.9.3 How easy is it for your company or organisation to hire an EU citizen who resides in another EU country?

Maximum 1 selection(s)

- ☐ a) Straightforward, or as easy as hiring a national
- ☒ b) It is complicated
- ☐ c) It is impossible

If you answered b or c could you explain which of the following are the main challenges?

- ☐ a) Lack of information on how to recruit third country nationals
- ☒ b) Lengthy procedures to process the visas
- ☐ c) Lack of applications from third country nationals
- ☐ d) Other (please specify which)

5.9.4 How easy is it for your company or organisation to hire a third country (non-EU) national?

Maximum 1 selection(s)

- ☐ a) Straightforward, or as easy as hiring an EU national
- ☐ b) It is complicated
- ☒ c) It is impossible

If you answered b or c could you explain which of the following are the main challenges?

- ☐ a) Lack of information on how to recruit third country nationals
- ☒ b) Lengthy procedures to process the visas
- ☐ c) Lack of applications from third country nationals
- ☐ d) Other (please specify which)

5.9.5 How could the EU help with addressing issues related to hiring and training third country nationals?

Maximum 1 selection(s)

- ☐ a) Develop and implement the EU Talent Pool for identified shortage occupations.
- ☒ b) Promote Talent Partnerships between EU Member States and non-EU partner countries to make hiring from abroad easier and better match EU labour market and employers' needs
- ☐ c) Open a digital academy for tourism upskilling and reskilling to third country nationals
- ☐ d) Promote and support projects between EU Member States and third countries to upskill the tourism workforce

5.10 Modes of transport

5.10.1 When travelling for leisure within the EU, which mode of transport do you most frequently choose?

Maximum 1 selection(s)

- ☐ a) Rail, if possible high-speed
- ☐ b) Car (private or rental)
- ☐ c) Electric car
- ☐ d) Coach or long-distance bus
- ☒ e) Short-haul flights
- ☐ f) Carpooling/shared mobility platforms
- ☐ g) Bicycle (private or rental)
- ☐ h) Cruise ship
- ☐ i) Recreational craft
- ☐ j) Ferry
- ☐ k) A mix of the above (please explain)

Based on your reply, what are your main reasons in choosing this mode of transport when travelling for leisure?

(Choose as many as you need – Please rank your answers: 1 = most important and 11 = least important)

	1	2	3	4	5	6	7	8	9	10	11
a) Low and zero emissions	☐	☐	☐	☐	☐	☐	☒	☐	☐	☐	☐
b) Efficiency and reliability	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐
c) Comfort / ease of access	☐	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐
d) Scenic routes	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒
e) Central city arrivals	☐	☐	☐	☐	☐	☐	☐	☒	☐	☐	☐
f) Flexibility	☐	☐	☐	☐	☐	☒	☐	☐	☐	☐	☐
g) Cost-effectiveness	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
h) Reduced travelling time	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐

i) General brand preference (e.g. airline loyalty, high-speed train brand loyalty, car rental company loyalty)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒	☐
j) Health reasons	☐	☐	☐	☐	☐	☐	☐	☐	☒	☐	☐
k) Another reason (specify)	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐

If any other reason, please specify

Regional aviation notably ensures access to remote and outermost regions, especially for some touristic destinations rely almost entirely on air for tourism arrival (e.g. Azores, the Canary Islands or Madeira with up to 100% of tourists arriving by air).

5.10.2 For business-related travel within the EU, which transport mode do you or your clients typically prefer?

Maximum 1 selection(s)

- ☐ a) High-speed trains
- ☒ b) Domestic/EU flights
- ☐ c) Private or company car
- ☐ d) Chauffeur or shuttle
- ☐ e) Remote participation instead of travel
- ☐ f) A mix of the above (please explain)

Based on your reply, what are your main reasons in choosing this mode of transport when travelling for business ?

(Choose as many as you need – Please rank your answers: 1 = most important and 11 = least important)

	1	2	3	4	5	6	7	8	9	10	11
a) Low and zero emissions	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
b) Sustainability requirements my company needs to meet	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
c) Efficiency and reliability	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
d) Comfort / ease of access	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
e) Scenic routes	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
f) Central city arrivals	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
g) Flexibility	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
h) Cost-effectiveness	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

i) Reduced travelling time	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
j) General brand preference (e.g. airline loyalty, high-speed train brand loyalty, car rental company loyalty)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
k) Any other reason (specify)	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

If any other reason, please specify

Same as the above

5.10.3 At your destination in the EU, what is your preferred means of mobility for getting around?

Maximum 1 selection(s)

- ☐ a) Public transport (metro, tram, bus)
- ☐ b) Walking
- ☐ c) Cycling
- ☐ d) Car rental or car sharing
- ☐ e) E-scooters or micromobility services
- ☐ f) Accessible transport services
- ☐ g) A mix of the above (please explain)

Based on your reply, what are your main reasons in choosing this mode of transport ?

(Choose as many as you need – Please rank your answers: 1 = most important and 9 = least important)

	1	2	3	4	5	6	7	8	9
a) Sustainability concerns (maintaining low emissions)	☐	☐	☐	☐	☐	☐	☐	☐	☐
b) Practicality for exploring cities	☐	☐	☐	☐	☐	☐	☐	☐	☐
c) Practicality for exploring remote and rural areas	☐	☐	☐	☐	☐	☐	☐	☐	☐
d) Practicality for travelling with families	☐	☐	☐	☐	☐	☐	☐	☐	☐
e) Practicality for elderly travellers or those with limited mobility	☐	☐	☐	☐	☐	☐	☐	☐	☐
f) Conveniency for short distances, especially in urban settings	☐	☐	☐	☐	☐	☐	☐	☐	☐
g) Health reasons (e.g. linked with physical activity)	☐	☐	☐	☐	☐	☐	☐	☐	☐

h) Enjoying the journey, not only the destination ("slow travel")	☐	☐	☐	☐	☐	☐	☐	☐	☐
i) Another reason (specify)	☐	☐	☐	☐	☐	☐	☐	☐	☐

5.10.4 In general, do you take into consideration any of the following factors when deciding on a travel destination?

(Choose as many as you need – Please rank your answers: 1 = most important and 5 = least important)

	1	2	3	4	5
a) Which modes of transport are available to reach the destination overall	☐	☐	☐	☐	☐
b) Availability of non-stop or direct flights	☐	☐	☐	☐	☐
c) Availability of train service, including local trains and public transport once in the destination	☐	☐	☐	☐	☐
d) Travel modes that produce the least amount of emissions	☐	☐	☐	☐	☐
e) Other (specify)	☐	☐	☐	☐	☐

5.10.5. What obstacles do you face in terms of connectivity, if any, when travelling?

Choose as many as you need - Please rank your answers: 1 = most important and 7 = least important)

	1	2	3	4	5	6	7
a) Limited air connectivity from my closest airport to my destination	☐	☐	☐	☐	☐	☐	☐
b) Limited train connectivity from my closest train station to my destination	☐	☐	☐	☐	☐	☐	☐
c) Difficulties in booking separate tickets for different modes of travel	☐	☐	☐	☐	☐	☐	☐
d) Difficulties encountered when booking car rental (one-way rentals, limited return options, etc.)	☐	☐	☐	☐	☐	☐	☐
e) Problems with combining different travel modes (e.g. train and bicycle)	☐	☐	☐	☐	☐	☐	☐
f) Remote areas, islands and outermost regions	☐	☐	☐	☐	☐	☐	☐
g) Other (please specify)	☐	☐	☐	☐	☐	☐	☐

5.10.6. What actions could the EU prioritise to improve transport connectivity for tourism across Member States?

Maximum 2 selection(s)

- ☐ a) Invest in cross-border high-speed rail and night trains to offer more connectivity options

- ☐ b) Making rail travel and multimodal journeys a cornerstone of EU's sustainable transport future, by enhancing the accessibility of tickets on digital platforms, especially for rail
- ☐ c) Invest in cross-border safe cycling infrastructure
- ☐ d) Expand accessible and inclusive transport options for elderly and mobility-impaired travellers
- ☒ e) Other (please specify)

If other, please specify

The importance of regional aviation for connectivity should be better recognised. Overall, air connectivity is essential and any obstacles which impede regional airlines viability should be removed. Such connectivity should be ensured through fair competition and financial support for new routes and for the decarbonisation of the sector. As already mentioned, achieving a successful and competitive energy transition requires strong policy actions as well as ambitious industrial and funding policies to support and protect regional airlines which have lower revenue per passenger.

5.11 A shared brand for Europe as a destination

5.11.1 Do you think Europe needs a shared, unified brand as a destination for tourists?

- ☐ Yes
- ☐ No
- ☐ Don't know

5.11.2 What key attributes should a shared European tourism brand emphasise to differentiate Europe as a destination?

(Rank from top to lower priority - 1 = most important and 10 least important)

	1	2	3	4	6	7	8	9	10	11
a) Rich history, culture, cultural heritage, arts and crafts	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
b) Rich natural assets	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
c) Commitment to sustainability	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
d) Innovation and technological advancement	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
e) Cultural and geographical diversity	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
f) Local food products and gastronomy	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
g) Safety and security for travellers	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
h) Ease of free movement and visa facilitation	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
i) European ideals and values (e.g. democracy, human rights, inclusivity)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

j) Other (please specify)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
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5.11.3 Should Europe and the EU be differentiated in branding to appeal to tourists? (Where Europe refers to the entire continent, including both EU and non-EU countries, while the EU refers to the 27 Member States)

- ☐ Yes
- ☐ No
- ☐ Don't know

5.11.4 How important is coordinated EU-wide marketing and branding compared to national and regional tourism promotion efforts?

- ☐ a) Not at all important
- ☐ b) Slightly Important
- ☐ c) Important
- ☐ d) Fairly Important
- ☐ e) Very Important

5.11.5 What challenges do you foresee in creating and maintaining a shared European tourism brand?

Maximum 6 selection(s)

- ☐ a) Lack of coordination
- ☐ b) Diverse national interests
- ☐ c) Competition between European destinations
- ☐ d) Funding
- ☐ e) Branding consistency
- ☐ f) Other (please specify)

5.11.6 What specific actions at EU level would most effectively enhance Europe's appeal as a global tourism destination?

Maximum 3 selection(s)

- ☐ a) Developing and promoting a unified European tourism brand
- ☐ b) Strengthening collaboration with key international source markets, including emerging markets, to boost tourism flows
- ☐ c) Strengthening collaboration with international organisations (e.g. OECD, UN Tourism, UNESCO) and multilateral forums (G20, G7)
- ☐ d) Enhancing EU-wide visa facilitation and travel authorisation processes
- ☒ e) Investing in multi-modal transport solutions and improving connectivity across Europe
- ☐ f) Improving connectivity to Europe (e.g. air connectivity)
- ☐ g) Improving tourism infrastructure and services in less-visited European regions
- ☐ h) Creating stronger storytelling and promotional campaigns, including through digital marketing
- ☐ i) Reinforcing the narrative related to local and regional cultural heritage across the EU

- ☐ j) Creating a strong identity around “European Tourism Day” (e.g. annual event, possibly extended across Europe)
- ☐ k) Providing more support for local tourism authorities to develop sustainable destination brands
- ☐ l) Fostering public-private partnerships to support innovation and investment in tourism in Europe
- ☐ m) Other (please specify)

5.11.7 What communication channels should the EU use to promote itself as a leading tourism destination?

Maximum 10 selection(s)

- ☐ a) Social media platforms (e.g. Instagram, YouTube, TikTok)
- ☐ b) Influencer partnerships and collaborations with travel bloggers and content creators
- ☐ c) EU-wide tourism websites and mobile apps (including the EU Tourism Platform) featuring sustainable, cultural, and innovative destinations and experiences
- ☐ d) Podcasts, webinars or online discussion forums
- ☐ e) Regular email newsletters
- ☐ f) Collaborations with global travel platforms (e.g. Booking.com, TripAdvisor)
- ☐ g) Partnerships with international organisations (e.g. OECD, UN Tourism) to amplify Europe’s tourism message
- ☐ h) Partnerships with news outlets and media platforms (e.g. Euronews, Politico) to reach a wider audience
- ☐ i) Print and TV/media advertisements (e.g. magazines, newspapers, streaming platforms, TV) International tourism expos or events, with dedicated booths and presentations
- ☐ j) Other {please specify}

5.12 Final thoughts

Is there anything else we have not taken into consideration through this survey, that you think should be developed in the EU Strategy for Tourism?

If so, can you detail which aspects to consider, and which kind of EU action would you envisage to address the issues you have in mind?

2000 character(s) maximum

If you want to provide additional evidence to support your replies above, please upload here

Thank you!

Your contribution is highly welcome. Thank you very much for sharing your views!

Contact

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