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# Crisis Management and Governance in Tourism

Final Report



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# Crisis Management and Governance in Tourism

## Final Report

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## Introduction

The COVID-19 pandemic paralysed the EU tourism ecosystem, putting it under unprecedented pressure, and revealing weaknesses in the ecosystem's crisis management capacity. Other disruptions had already shown how deeply the tourism ecosystem is impacted by adverse events, as well as revealing some shortcomings of its governance system. It is therefore important to create crisis management mechanisms to ensure that the tourism ecosystem is better prepared for future crises.

The main objective of this initiative funded under the SME Pillar of the Single Market Programme, was to **improve the governance and crisis management capacity of tourism actors in the EU, making them more resilient and better prepared for resisting, managing and mitigating crisis.**

The project was structured as follows to achieve this objective:

- **Stage 1:** Analysis of governance models and crisis management mechanisms in the tourism ecosystem

Analysis of the impact different crisis events had on the tourism ecosystem. This aims to identify vulnerabilities and understand relevant aspects of governance structures and processes and how they can be supplemented with better mechanisms.

- **Stage 2:** Assisting tourism authorities and sectors to improve tourism governance and resilience

Provision of advisory services to fifty-four destinations and cross-border professional associations, with the support of carefully selected tourism experts. The aim was to enhance these organisations' capacity for crisis prevention, management, and mitigation, leveraging on established guidance and collaboration material.

- **Stage 3:** Best practices and learning material

Using the knowledge developed in previous stages, to develop recommendations and best practices uploaded on the [EU Tourism Platform](#), and user-friendly learning material uploaded to the [EU Academy](#), to enhance resilience and crisis response skills across the tourism ecosystem. Further information is also available at the project's [webpage](#).

This report aims to provide EU tourism ecosystem stakeholders with a comprehensive overview of the most critical topics in resilience and crisis management. Its purpose is to enable tourism stakeholders to review and improve their governance structures and develop mechanisms to support

resilience building and preparedness for future crises. This report is supplemented by other material produced in this project, namely:

**1) Best Practices documents** – a set of best practices demonstrating actions taken by tourism organisations to address common vulnerabilities in tourism governance and to enhance crisis management preparedness;

**2) Recommendation documents:** a set of recommendations with high level implementation steps and options aimed at supporting tourism organisations to build resilience and crisis preparedness; and

**3) Learning material:** a learning journey with user-friendly learning materials designed to enhance resilience and improve governance and crisis response skills across the tourism ecosystem.

Readers will find the most significant findings gathered during this project in the following chapters. The initial chapters look back at the crises that have impacted the EU tourism ecosystem, and structure the lessons that can be learned from them. These include the risks to which EU destinations are most exposed as well as their common strengths and weaknesses, in the context of crisis management.

The following chapters, focus on the key barriers, drivers, and enablers for improving crisis management capacity. Also indicated are the key actions this project's fifty-four service beneficiaries – 49 destinations and 5 cross border professional associations - intend to implement to enhance their resilience and preparedness.

The report concludes with thirty-one policy recommendations, ten best practices and ten case studies targeted at different organisations and levels within the tourism ecosystem. The recommendations and best practices focus on strengthening governance and coordination, building resilience, improving crisis preparedness, and facilitating data deployment. The report additionally includes tools and operational guidelines to support destinations and sectors in developing preparedness for future crises.



## Executive summary

The objective of crisis management in tourism is to prevent, anticipate and create preparedness to respond, manage and minimise the impacts of crises on the ecosystem and on those affected by them. It also aims to facilitate the recovery of tourism activity. Advanced planning, engagement with key stakeholders, strong coordination between public and private sectors, streamlined and agile processes and excellent communication are required for destinations and sectors to be prepared to face future crisis events. Firstly, it is crucial to build resilience within the tourism ecosystem and take proactive action to prevent and mitigate vulnerabilities and risks that may lead to crises. When faced with a crisis situation, it is important to contain the impact and take the initial steps to stimulate recovery. This is done by taking action to address the immediate needs of tourists, businesses and local communities.

It is also important to build on a risk-based approach, to improve the preparedness and resilience of the tourism ecosystem. That approach takes into consideration and understands the challenges and opportunities of the ecosystem and collates the necessary human, technical and financial resources to develop better mechanisms and tools and to strengthen governance and coordination.

### Crises impacting the EU Tourism Ecosystem

European destinations have been impacted by several crises over the last 20 years. The COVID-19 pandemic brought EU tourism to a standstill, exerting immense pressure on its ecosystem, and highlighting weaknesses in its crisis management capacity. Prior events, such as the 2010 Eyjafjallajökull volcanic eruptions in Iceland and the 2015 terrorist attacks in France, had already shown how national or international crises can heavily impact the tourism industry, as well as exposing flaws in its governance and mechanisms.

**Crises** can be categorised into the following categories, considering the developments of recent years: **natural disasters, health related, human-made, financial, and technological**. Crisis events can also be divided into **sudden crisis events** - events that happen swiftly and unexpectedly with little or no warning signs or indicators; **creeping crises** - slow and gradual unfolding of a situation that may not initially be perceived as a crisis but eventually escalates into a significant problem or emergency; **and grey-rhino crises** - highly probable, high-impact threats or challenges that are often neglected, dismissed, or underestimated despite their obvious existence and potential consequences. This impacts how tourism destinations and businesses can effectively manage or prevent them.

Any of these types of crises has the potential to damage the tourism ecosystem's ability to operate normally. This may occur because of restrictions on travel,

damage to transport and other infrastructure and facilities, or because the destination is perceived to be unsafe.

### **Main risks identified by destinations and sectors**

Our analysis shows that risks are context-specific and vary considering the type of destinations, the characteristics and geography. However, there are some that universally raise concerns for destinations and activity sectors. **The top five groups of these risks are:**

- **Environmental risks:** risks arising from climate change and human-caused risks to the environment, as they can affect resources that are critical attractions for tourism.
- **Natural events:** wildfires, heavy rain, droughts, and volcanic eruptions as their high likelihood and destructive potential can severely damage infrastructure and natural attractions.
- **Labour shortage-related risks:** risks regarding the shortage of staff in the tourism ecosystem, as they can impact on the normal functioning and competitiveness of the industry.
- **Risk of financial crisis and political instability:** inflation, risk of sovereign debt crises, banking crises and stock market crashes, as these can result in decreased disposable income and reduce tourists' propensity to travel and spend.
- **Insufficient tourism governance mechanisms:** lack of support and policies to address tourism needs, inadequate governance, and lack of coordination among stakeholders, which can lead to reduced investment, economic challenges, sustainability issues, and coordination problems within the tourism ecosystem and with other policy areas.

## Most common strengths, weaknesses, opportunities, and threats identified in the context of crisis management

The most common strengths, weaknesses, opportunities, and threats identified by EU destinations and sectors in the context of tourism crisis management (figure 1) include:



Figure 1. Analysis of most common strengths, weaknesses, opportunities, and threats of European destinations and sectors

### Governance models and key challenges

Tourism policies and regulations in the European Union (EU) are the responsibility of individual Member States, and in some cases, they are managed at regional and local level. This poses a **challenge for EU level coordination as the 27 Member States may have vastly different approaches to managing tourism and dealing with crisis events**, although crises may expand beyond borders.

The tourism ecosystem is characterised by its diversity, encompassing eight different sectors, and in which 99.9% of the ecosystem's actors are SMEs. The effects of crisis events impact differently on each sector and a variety of actions are required to fulfil the specific needs of each one. This **diversity of stakeholders can make it challenging to develop a coordinated approach to tourism governance and crisis management**. Such an approach would be practical in the event of a cross-border crisis.

Other key challenges weakening the role of tourism management organisations, the governance of tourism destinations and hindering the capacity to build better resilience include:

- The **limited mandate and narrow scope of operational tourism organisations**, such as focus on promotion activities only. This limits organisations' ability to collaborate with policymakers, to engage with and support tourism stakeholders, to facilitate technical and financial support, and to provide crucial data and insights for informed decision-making and crisis management.
- The **unclear governance structures, roles, and responsibilities of tourism organisations in crisis management**. This leads to grey areas and inefficiencies with overlapping responsibilities where no single entity is clearly accountable and able to make decisions.
- The **highly fragmented tourism ecosystem makes governance and coordination exceptionally challenging**. The ecosystem comprises numerous actors with diverse and sometimes conflicting interests and perspectives.
- **Communication channels** among tourism stakeholders are often **poorly established**. This makes it difficult to share and disseminate information vertically and horizontally, to ensure it reaches all relevant stakeholders, including government authorities, tourism businesses, and tourists.
- **Changing policy priorities**. This can hinder long-term planning and the implementation of strategic initiatives essential for strengthening tourism governance.
- The **lack of agility** and the **slow and rigid nature of bureaucratic processes** (e.g., the slow approval processes for funding or the complex procedures for mobilising resources), **caused by many organisational layers and complex decision-making flows**. It often limits their ability to respond swiftly to emerging issues and crises.

### Key barriers to improving crisis management capacity

There are also some **barriers** hindering the ability of tourism destinations and sectors to develop better crisis preparedness and management capacity:

- There is often an absence of **strategic alignment between tourism strategies and overall national, regional, and local strategies**. Tourism planning for crisis management is not well-integrated into broader crisis management planning across various levels, creating a fragmented approach that impedes effective crisis preparedness and response.

- **Crisis management is not a priority area.** Overall, **tourism organisations**, both public and private, **have limited resources**. They end up earmarking those resources for areas that need urgent attention or for areas mostly related to their mandate and operation, such as promotion or product development.
- The **lack of common risk assessment frameworks and crisis response mechanisms does not ensure there are comparable methods** for tourism stakeholders to identify potential risks, evaluate their potential impact, and devise effective strategies to minimise the disruption caused by crisis events. Moreover, it makes it more difficult to learn from other destinations.
- **There is a lack of expertise and training in crisis management.** particularly within smaller local and regional DMOs.
- The tourism ecosystem is experiencing significant **labour shortages**. **These shortages limit resilience building and crisis preparedness** because they have less personnel with extensive experience in the field, which would help in preventing and addressing crises. Moreover, the shortage fuels high workloads for basic tasks, leaving no time for crisis detection, mitigation, and prevention measures.
- Many destinations and businesses **lack access to updated and reliable data**. Public (and free) information is often (although not always) very **recent** and not necessarily available at local level granularity. This limits destinations' ability to make timely decisions on measures to support the ecosystem or evaluate the effectiveness of those measures already implemented. Moreover, they often lack forward-looking indicators (e.g., bookings) which are essential to predict sufficiently in advance and monitor the impacts of a crisis event (e.g., severity and length) and decide on the best approach to stimulate the recovery and re-start of tourism.
- The **lack of advanced data collection and analysis systems** that incorporate modern technologies (e.g., AI), leverage big data, develop predictive models, aggregate data from diverse sources, perform comprehensive analysis and correlate different indicators, prevents effective crisis preparedness and management. Without these data destinations miss insights that enable proactive measures and swift responses.
- The **lack of skills and awareness regarding the use of data and existing data sources**, as well as lack of knowledge on how to interpret data insights hinders tourism ecosystem stakeholders from fully leveraging data-driven approaches to enhance resilience building, crisis management capacity and the monitoring of tourism activity.

- The tourism ecosystem's **ongoing recovery from recent crises** is putting extra pressure on organisations and businesses, which must face new crises without having fully recovered from previous ones.

### **Key drivers and enablers for improving crisis management capacity and resilience**

The project has also identified **key drivers and enablers** strengthening the role of tourism management organisations, enhancing the governance of tourism destinations, building resilience and better crisis management capacity.

#### **Drivers**

- The **Transition Pathway for Tourism** co-creation process has successfully identified key areas for action and defined relevant objectives. These inspire diverse groups of stakeholders to act and collaborate towards achieving the transition of the EU tourism ecosystem and to build its resilience.
- The COVID-19 pandemic **highlighted, amongst governments and policy makers, the importance of tourism in critical areas** such as economic growth, job creation, and cultural exchange. This has been essential for driving its inclusion in the overarching long-term strategic planning and resilience building.
- **Climate change** has driven tourism organisations to take action to improve resilience and sustainability (e.g., developing environmentally friendly tourism products, implementing initiatives to reduce seasonality, or increasing length of stay). It has also meant organisations develop better preparedness for the more frequent and severe climate-related and natural crisis events.
- Emerging **new consumer preferences** for sustainability, slow tourism, rural experiences, and authenticity are a driving force for resilience building in the tourism ecosystem. It is driving the development of tourism models that decrease vulnerabilities to crises. These new models reduce, for example, the pressure on major destinations, mitigating seasonality and contributing to the preservation of natural, cultural, and historical assets.

#### **Enablers**

- The increased **digitalisation** of the sector, new tools and big data are playing a pivotal role in enhancing crisis management capacity within the tourism ecosystem. Leveraging big data and advanced technologies enables better risk sensing and data-driven decision-making.

The availability of specialised **technical assistance and training programmes** from organisations and networks through the EU (e.g., support provided by [Enterprise Europe Network](#) – EEN) and national programmes (e.g., Digital Academy and the [Business Education for Smart Tourism](#) – BEST programme, of Turismo de Portugal) provides increased awareness and enhances crisis management skills.

- Available and anticipated **funding** opportunities, such as the Recovery and Resilience Facility (RRF), National and Regional Strategic Reference Frameworks (2021-2027), and Interreg, can provide important **financial support** to develop activities to build resilience and enhance crisis management preparedness.

### **Initiatives to increase the resilience and crisis preparedness of destinations**

One of the project's main objectives was to help the selected service beneficiaries draft action plans to improve their resilience and preparedness to manage and mitigate the impacts of crisis events.

The activities most indicated by the service beneficiaries provide critical insights into the current priorities of organisations in the tourism ecosystem (figure 2). **Those activities most mentioned include training & capacity building, development of crisis management plans and crisis communication strategies.** This is in harmony with the low maturity level of many service beneficiaries. It also highlights the need to take initial steps towards developing comprehensive crisis preparedness. Despite having experienced crises, many organisations still lack documented plans and procedures to effectively manage these events.

**Governance emerges as a key area of concern.** There is the pressing need for destinations and organisations to strengthen their governance structures. **This involves clearly defining roles & responsibilities in crisis management. Collaboration at various levels** and with a broad set of stakeholders within and outside the tourism ecosystem also needs to be enhanced.

Additionally, **data collection, analysis mechanisms and risk assessment** are also critical. They serve as crisis early warning mechanisms and to provide information for decision-making, crucial in resilience building.



**Figure 2. Overview of the most referred activities**

### Tourism ecosystem governance improvement and crisis preparedness

The **distribution of responsibilities of developing, promoting, and regulating tourism varies across EU countries**. It depends on factors such as the system of government, the importance of tourism in the economy or the nature of tourism demand. **There is no single approach that is better than the others**. The best model from an institutional perspective depends on a country's specific context, goals, and priorities. Each approach offers unique advantages.

What truly makes the difference and can help to address the challenges previously identified is:

- **Robust tourism management organisations positioned at national, regional, and local levels** – such as National Tourism Organisations (NTOs) and Destinations Management Organisations (DMOs) – that have broad responsibilities and an effective mandate to support the ecosystem. This support can be in various areas, including promotion, technical and financial support, education and training, and data collection and analysis.
- **Clear roles and responsibilities**. Each organisation should understand its limits and know which organisations, at different levels and of different sectors, they must coordinate with for resilience building, crisis preparedness and management.
- **Effective coordination** with (and within) the public, private and third sector, encompassing vertical, horizontal, and sectorial coordination.



- **Clear communication channels** for information sharing to further enhance coordination. This will ensure alignment amongst the diverse set of stakeholders (e.g., tourists, tourism businesses, and public tourism organisations at different administrative levels).
- Other factors identified as contributing to improved governance include reduced hierarchies, flexible and agile structures that enable quick decision-making.

**Governance should be supplemented with support mechanisms to improve the resilience and preparedness of the ecosystem for future crisis events.**

Tourism organisations, including NTOs and regional and local DMOs, should guarantee the **alignment of tourism strategies and crisis management plans** with overarching national, regional, and local strategies. National, regional, and local tourism strategies should also be aligned.

To **increase the resilience of the ecosystem**, destinations and sectors should **improve their tourism strategies** with initiatives that address main vulnerabilities, such as labour shortages, climate change and overtourism. They must also **develop or update their crisis management plans** with clear protocols, policies and measures and well-defined responsibilities. In parallel, they should **implement risk assessment** mechanisms and **conduct regular risk sensing** to identify early warning signals of potential crises and to reduce those risks.

The lack of resources, capacity and crisis management preparedness and management must be addressed through **targeted technical and financial support and training** to regional and local tourism organisations and SMEs.

The availability and quality of data are critical for resilience building, crisis preparedness, response, and recovery. The ecosystem should ensure **access to available, reliable, centralised, frequently updated data sources and indicators. These allow them to make informed decisions and forecast/predict in advance and monitor the impacts** (e.g., severity and length) of crisis events. There should be **open data collection & analysis platforms** to improve tourism intelligence and have insights and data that support destination management and resilience building.

It is also important to improve the capacity of **destinations and business managers** to ensure that public and private tourism organisations have the appropriate **understanding of the existing data sources, indicators, tools, and systems, as well as their use and limitations.**

## Policy recommendations

The insights gathered in the project and the identified needs of stakeholders, resulted in thirty-one policy recommendations. Of these, thirteen are aimed at national/regional level, eleven aimed at the EU level, and seven aimed at professional associations, covering the three primary focus areas (see below) identified in the project:

- **Strengthen Governance and Coordination:**

Recommendations for the national and regional levels include the **establishment of clear governance models with well-defined roles and responsibilities**. These models should focus on tourism development, resilience building, crisis preparedness and management. **Coordination efforts of key activities are recommended at the highest administrative level**, led by NTOs or Regional DMOs, which should be equipped with **strong operational and promotional** mandates. Regional and local DMOs should also be equipped with sufficiently broad operational and promotional mandates to effectively support tourism businesses operating at those levels. **Coordination is of utmost importance**. It is therefore recommended that these organisations engage in **vertical, horizontal and sectorial coordination** to ensure collaborative management for tourism development, crisis preparedness and management.

It is recommended, at EU level, to leverage the existing expert group **Together for EU Tourism (T4T)**. **This group will assess industry sentiment and prepare the T4T Resilience Working Group to be the EU-level Crisis Management Group**.

It is recommended, in line with recommendations for national and regional destination management organisations, that **professional associations create a dedicated resilience and crisis management team to support their sector and enhance collaboration with the public sector**.

- **Build Resilience and Improve Crisis Preparedness:**

Recommendations at the national and regional levels include enhancing **tourism strategies to build resilience and address pressing vulnerabilities**, such as labour shortages, climate change, and overtourism. The recommendations further emphasise the importance of providing the **necessary technical assistance and financial resources** to support resilience building, crisis preparedness, and crisis management, with particular **focus on SMEs**.

It is also recommended to **develop or improve crisis management plans, establishing crisis communication mechanisms, and develop a**

**set of measures** to be activated when a crisis occurs. This will create preparedness for future events.

Recommendations at the EU level include **leveraging the EU Tourism Platform to enhance knowledge sharing, collaborative work, and twinning opportunities**. This should be supplemented by **ensuring systematic funding** and **implementing long-term technical assistance** to support the resilience building and crisis preparedness of the tourism ecosystem.

The development of an **EU Risk Assessment Framework** is recommended to improve risk sensing and crisis preparedness and to facilitate comparability and knowledge sharing about risks and mitigation measures. It is additionally suggested that the **Re-open EU platform** be prepared, **to serve as the one-stop shop for EU crisis communication to travellers and tourism companies, if needed**.

To improve the sectors' capacity in resilience, crisis preparedness, and management, the professional associations are recommended to develop **sector-specific guidelines and learning material**. These will include specific examples for crisis prevention, mitigation, and management for the sector's activities. They should also engage in **awareness raising and training activities** for their members, at the managerial, employee and entrepreneurial level.

- **Facilitate Deployment of Data:**

Recommendations for destination managing organisations are that they analyse their data needs and **expand their destination-specific data sources accordingly**. **Developing advanced user-friendly platforms for data collection and analysis** could help to generate insights and support destination management at both national and regional levels. This should be supplemented at EU level by the **continuous improvement of Eurostat and EU Tourism Dashboard data**. Professional associations can support the collaborative improvement of tourism data for crisis management by **developing sector-specific data resources** for their members and for destinations. This will be a key knowledge resource complementing the public databases and contributing to the Tourism Data Space. Essential for improving data deployment both for destinations and professional associations is to improve their awareness of existing data resources and data literacy skills. They can then make use of that data for analysis and decision-making.

## 1. Assisting tourism authorities and sectors to improve tourism governance and resilience

The project worked side by side with destinations and cross-border professional associations, with carefully selected tourism experts providing advisory services. The aim was to enhance these organisations' capacity for crisis prevention, management, and mitigation, leveraging on established guidance and collaboration material.

The implementation of the advisory services and the interactions with service beneficiaries and experts enabled the project to collect insights into the challenges facing destinations and sectors, their main vulnerabilities, risks that are of most concern to them, and the assessment of their situation. Furthermore, it enabled the identification of key barriers, drivers, and enablers for improving crisis management capacity and the key actions service beneficiaries aim to implement to increase their resilience and preparedness.

### 1.1. Characterisation of the service beneficiaries and experts

#### Call for Expressions of Interest

The project team developed and launched a Call for Expressions of Interest (EoI) to identify destinations and countrywide professional associations across the EU and SMP countries interested in receiving advisory and assistance services. The project team has defined the eligibility criteria for the selection of service beneficiaries and developed the content for the call itself to implement the Call for EoI.

The launch of the Call for EoI was followed by a promotional campaign, in order to achieve the target number of applicants, it was promoted through different promotional means to ensure the information reached applicants from across the EU and SMP countries who would effectively benefit from the advisory and assistance services.

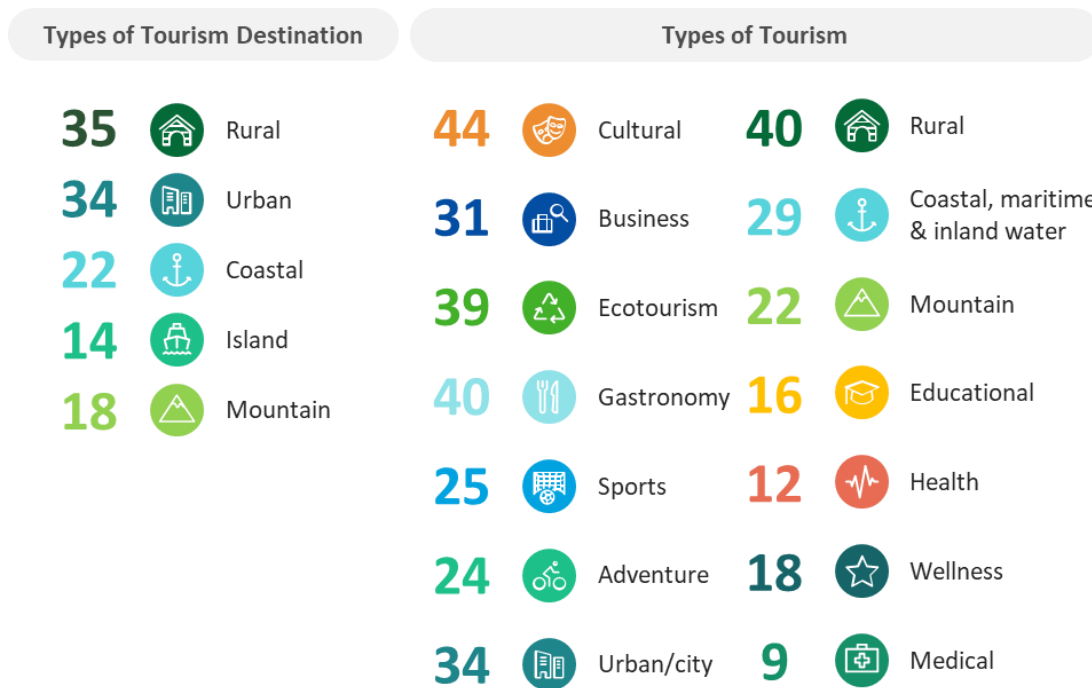
#### Service Beneficiaries

In line with the project specifications, **service beneficiaries – destinations and cross-border professional associations** were selected to receive assistance and advisory services to receive advisory support and develop action plans to enhance their resilience and crisis preparedness. **Experts** in Tourism and Resilience were carefully selected to deliver the assistance service and matched with service beneficiaries.

The final pool of service beneficiaries assured diversity in several domains. It represented **twenty-one countries** – figure 3 displays the geographic distribution



The service beneficiaries encompassed the **different types of destinations** - rural, urban, coastal, island and mountain - and **types of tourism** – cultural, business, ecotourism, gastronomy, rural, coastal, maritime and inland water, mountain, educational, sports, adventure, urban/city, health, wellness and medical, as illustrated in figure 4.



**Figure 4. Types of destinations and types of tourism**

The selected cross-border professional associations represented three of the tourism ecosystem actors (as per DG GROW’s Annual Single Market Report 2021<sup>1</sup>), as displayed in figure 5.



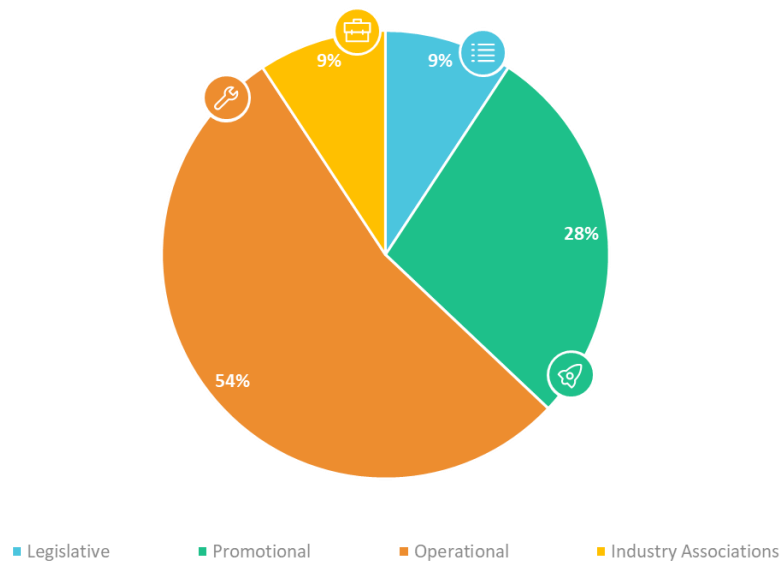
**Figure 5. Tourism ecosystem actors**

<sup>1</sup> [https://commission.europa.eu/system/files/2021-05/swd-annual-single-market-report-2021\\_en.pdf](https://commission.europa.eu/system/files/2021-05/swd-annual-single-market-report-2021_en.pdf)

The service beneficiaries had different roles, responsibilities, and mandates which were grouped into the following categories (figure 6).



**Figure 6. Overview of the Type of Organisation and its main responsibilities**



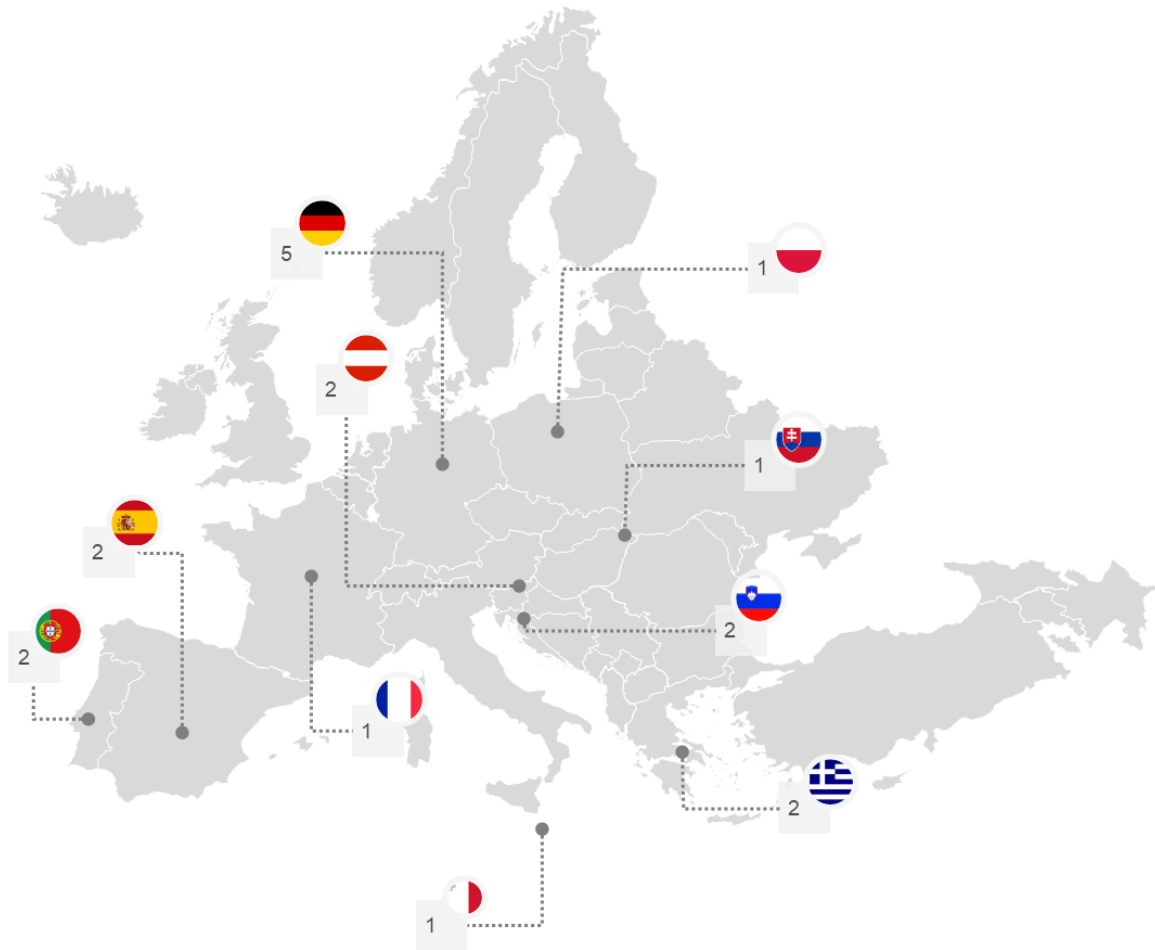
**Figure 7. Distribution of the service beneficiaries considering their mandate area**

Figure 7 illustrates the distribution of the service beneficiaries according to their mandate areas. Half of the service beneficiaries (54%) were organisations with operational responsibilities, tasked with policy implementation and closely involved in supporting the tourism ecosystem; 28% were organisations with promotional responsibilities, focused on promoting their destinations; 9% of them had legislative power, involved in policy development; and 9% represented industry associations.

The annex ([Selected Service Beneficiaries](#)), contains detailed information regarding each service beneficiary, namely their level and mandate area.

## Experts

The experts selected to provide the advisory services complied with multiple criteria to ensure a well-balanced and diverse team. The final pool of experts was composed of ten women and nine men, from ten different countries, as illustrated in figure 8.



**Figure 8. Expert's Geographic Distribution**

The experts of this group have notable academic backgrounds and have conducted academic research on the topic of tourism and crisis management:

- 89% of the selected experts have either a master's degree (32%) or a PhD (58%) in relevant areas of the project.
- 79% of the selected experts have already published academic papers/scientific publications in the tourism field.
- 47% of the selected experts have already published academic papers/scientific publications regarding risk or crisis management.



They also had very relevant work experience as regards the project's scope:

- 63% of the experts have more than 20 years of experience in crisis/risk management or in the tourism ecosystem.
- 84% of them have conducted more than 10 projects and activities on this topic.
- 94% of them have proven experience in governance structures and tourism policies for tourism destinations.
- 94% of them have proven experience in key data elements and data sources for tourism.
- 79% of them have proven experience in resilience and crisis management in the tourism sector.
- 74% of them have proven experience in managing an association/organisation/destinations/tourism company during a crisis period.

Their transversal experience, which was also important for the scope of the project, was:

- 84% of the experts have worked both with the public and private sectors.
- 79% of them have proven experience in working with at least 2 tourism ecosystem actors.
- 79% of them have proven experience working at different levels (Local, Regional, National, European, or International).
- 89% of them have proven experience with the European Commission or other European organisations.

The project also ensured that apart from their knowledge and expertise on the topic, the selected experts had the resources/tools to facilitate the in-person collaborative exercises with different stakeholders in an engaging way. In this regard, most of those selected were professors (53%) and consultants (47%) with proven experience in conducting workshops/lectures/in-person sessions (100% of the experts) and in the provision of advisory and assistance services (also 100%).

## Assistant Service Package

The project delivered assistance and advisory services during a period of 5 months, between the 27<sup>th</sup> of November of 2023 and the 15<sup>th</sup> of April of 2024.

Each assistance service package implemented included the following sessions:

1. **Kick-off Webinar:** An online session to ensure the selected Experts understood the context and objectives of the service, delivery model and monitoring system, the service framework and the guidance and collaborative material.
2. **Introductory Session:** An online session in which the selected Service Beneficiaries were onboarded to the Assistance Service Package. It also presented the context and objectives of the service, the delivery model and monitoring system and the guidance and collaboration material that will be used in the different sessions.
3. **Initial Online Meeting:** In these meetings service beneficiaries and experts aligned on the objectives and expectations of the service and confirmed the focus areas previously indicated by the service beneficiary on the application form. It was also important to tackle open questions, clarify any remaining doubts and to align the details and preparatory tasks to be done before the In-Person Workshop.
4. **In-Person Workshop:** Full-day in-person sessions designed for collaborative work. Using the guidance and collaboration material developed by Deloitte, the Experts worked with the Service Beneficiaries to conduct a risk assessment; perform a SWOT analysis; brainstorm on possible measure to improve tourism governance/mechanisms/data and the resilience of the destination/sector; and design an action plan.
5. **Remote Advisory Sessions:** The service beneficiaries and the experts used these online sessions to support the development/improvement of the Action Plan. These sessions were also used to fill in the online factsheet, the final deliverable of the project which summarised the work developed during the Assistance Service Package.

## 2. Setting the scene

### 2.1. Crises terminology and characteristics

A crisis is defined as a period of intense uncertainty characterised by unpredictability and loss of control over key functions of systems<sup>2</sup>. The Pacific Asia Travel Association considers crisis as “any situation that has the potential to affect long-term confidence in an organisation or a product, or which may interfere with its ability to continue operating normally”<sup>3</sup>.

The ISO 22361 definition of crisis was adapted for this project, to develop a new one for the tourism ecosystem:

#### **CRISIS IN THE TOURISM ECOSYSTEM**

An abnormal or extraordinary event or situation that threatens a tourism destination or business and requires a strategic, adaptive, and timely response to preserve its viability and integrity<sup>4</sup>.

The crisis or situation may present a high degree of complexity, instability, uncertainty, and exceed the response capacity or capability<sup>5</sup> of a tourism destination or organisation. It poses threats to organisations or communities. It affects their ability to function, reputation, brand, physical assets, intellectual property<sup>6</sup>, organisational structure and the social, environmental, and economic factors.

A crisis can be either perceived<sup>7</sup> or real. In any case, it disrupts normal operations, and its effects can be immediate or delayed in time. Moreover, a crisis demands immediate decisions and counter measures, to mitigate the negative consequences as much as possible<sup>8</sup>.

Shocks caused by a crisis can be systemic or not. A **systemic shock is defined as one that affects a significant number of economic agents from different tourism sectors in more than one country and the impact of which unfolds during a relatively short time**<sup>9</sup>. Moreover, these systemic shocks are commonly

<sup>2</sup> COMCEC, Risk and Crisis Management in Tourism Sector: Recovery From Crisis in the OIC Member Countries, 2017

<sup>3</sup> PATA 'Crisis. It Won't Happen to Us!: Expect the Unexpected, Be Prepared', 2003

<sup>4</sup> Integrity should be interpreted as a measure of the wholeness and intactness of the natural / and or cultural heritage and its attributes. In this context it refers to the integrity of a destination's resources (e.g., natural, cultural, historical) and assets. To preserve the integrity of a destination is to preserve its resources (natural, cultural, historical), which are critical assets for a destination's tourism.

<sup>5</sup> Capability - ability to accomplish an undertaking with a defined intended outcome and within specified conditions. In this case it refers to the ability (know-how, governance structures in place, processes, resources) of a destination to respond to a crisis event; Capacity - availability of the capabilities; Crises challenge the capabilities of the organisation beyond its inherent coping capacity.

<sup>6</sup> Identity, Culture, Heritage, Traditions

<sup>7</sup> For example: war in a neighbouring country or the rumours of social unrest and political instability, create the perception

of lack of security, which can negatively impact on demand for a destination

<sup>8</sup> Asian Tourism Crisis Communications Manual, 2015

<sup>9</sup> World Bank Group – Crisis Response and Resilience to Systemic Shocks, 2017

associated with the “domino effect.” For example, any crisis that disrupts airline transportation, will have impacts on several other sectors.

It is important to distinguish between a “risk”, “issue”, “incident” and a “disruption”:

- **Risks:** the possibility that the occurrence of an event or situation will adversely affect the achievement of the destinations or organisation’s objectives.
- **Issues:** events or situations that do not currently present, but can develop into, a long-term or significant negative impact on the strategic objectives, reputation or viability of the destination or organisation.
- **Incident:** events or situations that can be, or could lead to, a disruption, loss, emergency, or crisis.<sup>10</sup>
- **Disruption:** a situation in which it is difficult for something to continue operating in the normal way.

That said, a risk could escalate to an issue, then an incident, then a crisis. Destinations and tourism organisations should recognise changes and be flexible to adjust their response accordingly. Figure 9 demonstrates the link between these topics.



**Figure 9. Link between issues, incidents, and crisis (adapted from Deloitte crisis management framework to emerge stronger)**

Although many crises appear to be unique, they often have common characteristics:

- **Predictability** - Crises are typically unique, rare events or situations. Some crises can be anticipated; however, timing and impact are not always foreseeable.
- **Onset** - Crises can occur from a no-notice or short-notice event, but they can also emerge from an incident that has not been contained, has been managed badly or further escalates to have reputational consequences, and which requires a crisis-level response.

<sup>10</sup> ISO, ISO 22361 - Security and resilience — Crisis management — Guidelines, 2022

- **Urgency and Pressure** - A crisis needs urgent attention as its impact can be very high. Given the potential impact and the increased visibility, a crisis usually places heavy pressure on the tourism destination and/or organisation.
- **Impacts** - Crises can disrupt or affect the entire tourism ecosystem, transcending geographical and sectoral boundaries. As crises tend to be complex and inherently uncertain, the long-term impacts can be difficult to assess. A crisis not handled effectively can lead to a catastrophic loss of functionality, values, trust, and reputation. These negative impacts can have a lasting and detrimental effect on the destination, organisations, or community. The size, location and type of tourism destination/organisation/community can make it more susceptible to certain incidents which can become crises.
- **Scrutiny by public, media, and other interested parties** - Crises are likely to result in significant scrutiny and interest among interested parties including members of the public, product and service users, specific groups (such as regulators, shareholders or industry bodies) and the media, including social media. The specific parties taking an interest in the crisis will depend on the type of event, who it threatens, and who it impacts.
- **Manageability through established plans and procedures** - Crises, through a combination of their novelty, inherent uncertainty and potential scale and duration of impact, are not solved through the application of predefined procedures and plans alone. They demand a flexible, creative, strategic, and sustained leadership response. The organisation will rely on its crisis management structure, methods, planning, training, and implementation. Crises challenge the capabilities of the organisation beyond its inherent coping capacity.

Crises have a special impact on confidence, considering inherent specificities of the tourism industry, and they interfere with the ability to continue normal operations. In fact, tourism destinations are particularly vulnerable to crises due to their economic dependence on visitors and the need to keep a positive image of attractiveness and safety<sup>11</sup>. Crisis management is, in this sense, crucial for tourism and hospitality management. A well-managed crisis can demonstrate the positive qualities of an organisation or destination and enhance its reputation. The importance and need to develop crisis management plans and response strategies in the tourism sector is, therefore, being increasingly recognised by the industry and policymakers.

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<sup>11</sup> [How does destination crisis event type impact tourist emotion and forgiveness? The moderating role of destination crisis history - ScienceDirect](#), Lujun Su, Lin Pan and Yinghua Huang, 2022

## 2.2. Crisis management and resilience

Crisis management consists of the “strategies, processes and measures which are planned and put into force to prevent and cope with crisis”, according to UN Tourism. Crisis management is an integral part of the wider policy area of resilience, which includes crisis avoidance and longer-term strategic planning.

The objective of crisis management in tourism is to prevent, anticipate and create preparedness to respond to, manage and minimise the impacts of crises on the sector and on those affected, as well as to facilitate the recovery of tourism activity. Advanced planning, engagement with key stakeholders, strong coordination between public and private sectors, streamlined and agile processes and excellent communication are required for a destination to be prepared to face future crisis events or to prevent them from occurring. Specific action is needed to address the immediate needs of visitors, businesses, and local communities, to contain the impact and to take the initial steps to stimulate recovery.

Another important concept is “resilience”. **Resilience** is the **ability of an organisation or system to anticipate, prepare for, respond, and adapt to incremental change and sudden disruptions/shocks, to survive and prosper**<sup>12</sup>. Resilience is, therefore, the ability of a tourism destination and/or organisation to take action that can prevent crisis events from occurring, mitigate their impacts or promote a rapid recovery from them.

Continued growth in tourism over six decades led to the widely held belief of the inherent resilience of the tourism economy. Current resilience actions in tourism are aligned with crisis management and sustainability principles<sup>13</sup>, and measurement is focused on recovery. Nevertheless, resilience, such as crisis management, relates to action both before and after an event occurs:

- **Prior to a shock:** Action to mitigate the risk and limit the size of the impact by detecting endogenous vulnerabilities and reducing the future impact.
- **After a shock:** Action to promote recovery through adaptation and transformation, particularly through learning from previous crises and adapting to better address future threats of a similar nature. Categorisation and characterisation of crisis events.

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<sup>12</sup> Denyer, D. (2017). Organisational Resilience: A summary of academic evidence, business insights and new thinking. BSI and Cranfield School of Management.

<sup>13</sup> UN Tourism definition: Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee long-term sustainability

## 2.3. Categorisation of crisis in the tourism ecosystem

**Crises were categorised into the following categories**, considering the developments of recent years: natural disasters, health related, human-made, financial, and technological.

**Table 1. Categorisation of crisis according to type**

<b>Natural disasters</b>	<ul style="list-style-type: none"> <li>• Fires • Flooding • Drought • Avalanche • Winter storm • Severe rain or windstorm • Extreme heat • Tsunami • Earthquake • Landslides • Mudflows</li> <li>• Blue green algae outbreak • Volcanic plumes • Hurricanes • Tornadoes • Animal attacks</li> </ul>
<b>Health-related</b>	<ul style="list-style-type: none"> <li>• Epidemics • Outbreak of diseases (Legionnaire's, Meningococcal or Ebola)</li> <li>• Pest plagues (rodents and insects) • Food poisoning • Humanitarian crises</li> </ul>
<b>Human-made</b>	<ul style="list-style-type: none"> <li>• War • Terrorist attacks • Oil spill • Social unrest • Political instability • Water pollution • Air pollution</li> </ul>
<b>Financial</b>	<ul style="list-style-type: none"> <li>• Economic crises • Fiscal crises • Exchange rate collapses</li> </ul>
<b>Technological</b>	<ul style="list-style-type: none"> <li>• Transportation accidents • Cyber-attack • Human shortcomings in operating technology • Technological failures • Hazardous material accidents (gas leak)</li> </ul>

The first category refers to **natural disaster crises**, a consequence of natural hazards. This includes all types of severe weather, which have the potential to represent a significant threat to human health and safety, property, and critical infrastructure. It can cause significant damage, namely disruptions to human, material, or environmental components.

The second category refers to public health issues: **health related crises**. It consists of a situation or complex health system that affects humans in one or more geographic areas. Health crises can have significant impacts on community health and on the economy. This type of event may result from disease, industrial processes, or poor policy. The extent of the effects depends on how public authorities react. The COVID-19 pandemic has clearly shown the importance of public health issues as it caused immense human suffering<sup>14</sup>, leading to unprecedented economic impacts<sup>15</sup>.

The third category refers to events caused by human action: **human-made crises**. Tourism is especially vulnerable because of its susceptibility to human-

<sup>14</sup> Building a European Health Union: Reinforcing the EU's resilience for cross-border health threats. European Commission, 2020

<sup>15</sup> <https://www.unwto.org/tourism-and-covid-19-unprecedented-economic-impacts>

induced crises. Terrorist attacks or political instability are just two examples of crises caused by human action.

The fourth category refers to **financial crises**. This type of phenomenon is related to the financial situation (e.g., inflation crises, sovereign debt crises, banking crises and stock market crashes) of the destination country/region and/or source markets. The 2008–2009 global economic crisis was one example of how a financial crisis can impact the tourism sector. It caused a decline of 4% in international tourist arrivals and a 6% decrease of international tourism revenues in 2009<sup>16</sup>.

The final category refers to **technological crises**. It includes airline, car, bus, vehicle, or train crashes due to poor maintenance, failure of obsolete technology resulting in service failure, failure of computer systems and either loss, theft or corruption of data. This category is gaining prominence due to cyber-terrorism or cyber-crime that can compromise data, damage communications, and destroy records of business transactions, financial records. It can also result in major theft or completely close an entire computer network. A cyber-attack on an airline computer system has the potential to make an airline inoperable if no manual backup systems are available.

Any of these crisis events has the potential to damage the tourism sector's ability to operate normally, either because of damage to transport and other infrastructure and facilities, or because of the perception that the destination is unsafe. In fact, a crisis affecting tourism can be quickly followed by a decline in visitor arrivals. This consequently leads to loss of jobs, reduction in business turnover and profits, falling tax revenues for the government and the decrease in investment.

It is important to note that some crises can result from a combination of events of different categories. For example, the Great East Japan Earthquake (natural & environmental disaster), triggered a nuclear disaster in Fukushima (technological event).

## 2.4. Different time frames of crisis development

Three categories on how quickly a crisis unfolds or happens were also established: sudden crisis events, creeping crisis events, and grey-rhino crisis events. This impacts how tourism destinations and associations can effectively manage them.

**Sudden crisis events** refer to events that happen **swiftly** and **unexpectedly** with **little or no warning signs** or indicators. These crises demand an immediate response due to their rapid escalation and potential widespread impact. Normally, destinations or organisations only have time to respond and recover.

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<sup>16</sup> Economic Crisis, International Tourism Decline and its Impact on the Poor. International Labour Organisation (ILO), 2013



A **creeping crisis event** refers to a **slow and gradual unfolding** of a situation that **may not initially be perceived as a crisis but eventually escalates into a significant problem or emergency**. Unlike sudden or rapidly escalating crises, creeping crises develop over an extended period. They often have subtle warning signs or incremental changes that may go unnoticed or disregarded until they reach a critical point. Destinations and organisations usually have some time to prepare, and they can then respond and recover appropriately.

Crises that are **high probability, high-impact threats**, or challenges and which are often neglected, denied, or underestimated, despite their obvious presence and potential consequences, are considered **grey-rhino crisis events**. Recognising and addressing these threats require proactive risk assessment, scenario planning, and decisive action to mitigate their impact before they escalate into full-blown crises. Destinations and organisations usually have time to prepare, respond and recover from these events.

Table 2 contains an overview of examples of crises events and their categorisation according to timeframes.

**Table 2. Categorisation of crisis events according to timeframe and type**

	Natural	Health-related	Human-made	Financial	Technological
Sudden Crisis Events	Extreme weather events	Food poisoning Pest plagues	Terrorist attacks Oil spill		Transportation accidents Hazardous technological failures Cyber attacks
Creeping Crisis Events		Pandemics & Epidemics Disease outbreaks	War Social Unrest Political instability		Human shortcomings
Grey-Rhino Crisis Events	Climate change Loss of biodiversity Water shortage		Pollution Overtourism Labour shortages	Economic & Financial Crisis	

## 2.5. Disruptions and impacts of crisis events on the EU Tourism Ecosystem

This chapter provides an overview of the disruptions and impacts different crisis events can have on the EU tourism ecosystem. It delves into the root causes or main drivers of these impacts and identifies the consequences and effects of various categories of crisis events.

### 2.5.1. Natural disasters

Natural disasters can have a significant impact on the tourism ecosystem. The table below summarises their main impacts.

**Table 3. Summary – main issue and impacts of Natural & Environmental disasters (non-exhaustive)**

Natural Disasters	
Main issue	Impacts
<p><b>Disruption of infrastructure</b></p> <p>Natural disasters can damage transportation infrastructure (e.g., bridges, airports), accommodation, food service establishments or even natural attractions (e.g., beaches, parks, trails, wildlife habitats).</p>	<p><b>Loss of accommodation, food service establishments and other tourism support amenities</b></p> <p>Damage or destroy hotels, resorts, and other tourism facilities, reducing the number of available rooms and facilities for tourists.</p>
	<p><b>Negative impact on natural attractions</b></p> <p>Damage or destroy natural attractions such as beaches, parks, trails, and wildlife habitats, reducing the appeal of destinations to tourists.</p>
	<p><b>Negative impact on cultural and historical heritage</b></p> <p>Damage or destroy invaluable cultural and historical heritage, reducing the appeal of destinations to tourists.</p>
	<p><b>Decrease in tourism demand</b></p> <p>Tourists consider other tourism destination alternatives. The impact of natural &amp; environmental disasters is present even if no natural disaster actually occurred, rather such disasters are just probable.</p>
	<p><b>Increase in safety concerns</b></p> <p>Safety concerns of tourists increase, regarding events such as the risk of flooding, landslides, or other hazards.</p>
	<p><b>Financial losses &amp; unemployment</b></p> <p>Generate considerable financial losses (due to infrastructure damage), difficult to surpass for small and medium-sized enterprises (SMEs). The closure of businesses also leads to unemployment.</p>

### Natural Disasters

#### Economic impact on local businesses

Decline in tourist activity which has a ripple effect on local businesses that depend on tourist spending.

Although, from a theoretical point of view, there is an assumption of a negative relationship between disasters and inbound tourism<sup>17</sup>, the effects of natural and environmental disasters can also have a positive impact on tourism in the medium to long-term. There are several reasons that explain this phenomenon. One of them is strengthening the visibility / prominence of these destinations.

Another reason may be related to changes in the morphology or conditions of the respective tourist destination, which may generate new reasons of interest for visits. One such example was the eruption on the island of La Palma - a UNESCO recognised biosphere reserve replete with verdant forests, rocky peaks, and desert - in 2021. The number of cruise ships stopping at the island has increased since the eruption, as well as an increase in the number of direct flights from mainland Spain and elsewhere in Europe.

Natural disasters can also foster solidarity, focusing global interest on the region as regards economic opportunities, including tourism<sup>18</sup>. An example of this is the 2017 wildfires in Portugal's Centre Region. The region's total tourism income grew in both 2017 and 2018, as many tourists wanted to support the region.

Volcanic eruptions are, of the different types of natural and environmental crises, typically the ones with an impact on the tourism ecosystem that might become international. Most of the other natural crisis events have a local or regional impact which are concentrated on the areas where they take place.

The comparison of different disaster types shows that:

- Volcanic eruptions (such as Iceland's Eyjafjallajökull) have the potential to cause the most significant and substantial negative impact on tourism.
- Floods, storms, and tsunamis have lesser and shorter-term impacts. It is difficult to establish whether the negative effect of these events is due to the possible destruction or disablement of infrastructure or the negative impact on the destination's reputation.
- Wildfires and earthquakes have mixed effects on international tourist arrivals. While, on the one hand, they result in economic losses due to damage to infrastructure / built assets and business capability, which is

<sup>17</sup> Catastrophe of Environment: The Impact of Natural Disasters on Tourism Industry, Journal of Tourism & Adventure 1:1 (2018) 86-94, 2018

<sup>18</sup> Catastrophe of Environment: The Impact of Natural Disasters on Tourism Industry, Journal of Tourism & Adventure 1:1 (2018) 86-94, 2018

likely to reduce tourist arrivals, on the other hand they can spark visitors' interest in the destination.

- Some types of events are unlikely to have a major effect on arrivals, for example an unexpected landslide, a cold/heat wave. These are typically characterised by having little or no impact on infrastructure and generate no long-term risk to tourism.<sup>19</sup>

According to the WTTC – World Travel and Tourism Council (2016), natural crises are one of the categories with the highest average recovery time, estimated to be 23.8 months.

### 2.5.2. Health-related

Health-related crises can have significant impact on community health and on the economy. The extent of the effects depends on how public authorities react. Table 4 summarises the main issue and impacts of a health-related crisis event.

**Table 4. Summary – main issue and impacts of Health-related crisis events (non-exhaustive)**

Health-related	
Main issue	Impacts
<p><b>Measures, recommendations and restrictions imposed by governments to contain the spread of infectious diseases</b></p> <p>During a pandemic, social distancing, crowd control, mobility / travel restrictions and quarantine are some of the main requirements.</p>	<p><b>Destination's image and competitiveness</b></p> <p>Health related crises provoke severe damage to a destination's image, impacting its competitiveness on the international market.</p>
	<p><b>Decrease in tourism demand</b></p> <p>As a result of the mobility / travel /safety restrictions imposed by governments to contain the spread of the virus and tourists' perception.</p>
	<p><b>Changes in tourist behaviour and travel patterns</b></p> <p>There is the preference during a pandemic for domestic travel, short-distance travel and less populated destinations/remote destinations.</p>
	<p><b>Increase in health &amp; safety measures</b></p> <p>Sanitation and cleaning protocols are required, increasing costs, and putting additional pressure on profitability.</p>
	<p><b>Financial losses &amp; unemployment</b></p> <p>Airlines and accommodation are the first to be impacted in a health-related outbreak. Tourist attractions and businesses may be forced to close temporarily or permanently, leading to job losses and economic downturns.</p>

<sup>19</sup> The effects of natural disasters on international tourism: A global analysis, Tourism Management Volume 79, 2020

Although the tourism ecosystem worldwide has experienced several health-related crisis events, such as SARS in 2003, Swine flu (H1N1) in 2009, Ebola in 2014 and MERS in 2012, the COVID-19 outbreak in December 2019 and its unprecedented disruption to tourism has placed this type of crisis in the spotlight.

While there were three global pandemics during the 20<sup>th</sup> century, four pandemics have already occurred in the 21<sup>st</sup> century. The proliferation of pandemics might stem from a plethora of causes, including increasing communication and global mobility, urbanisation, the high concentration of people, and the growth of the global transportation system<sup>20</sup>.

The expected impact of health crises on tourism is primarily manifested in tourism demand, especially in visitors arriving from longer distances. This is the result of restrictions imposed by governments to contain the spread of infectious diseases during a pandemic, including social distancing, crowd control, limited mobility, travel restrictions and quarantine requirements. Moreover, disease outbreaks often adversely affect a destination's image and competitiveness, and, consequently, tourism demand. They can also cause changes in tourist behaviour and travel patterns - for instance, the preference for domestic travel, short-distance travel, and less populated destinations.

Decrease in tourism demand due to health-related events impacts the entire tourism ecosystem as it leads to a significant decline in tourism revenues. Airlines and accommodation are impacted first in an outbreak. Tourist attractions and businesses (mainly small and medium-sized enterprises) may be forced to close temporarily or permanently, leading to job losses and economic downturns. Additional health and safety measures, such as increased sanitation and cleaning are required, increasing costs, and putting additional pressure on profitability.

Except for COVID-19, which impacted globally, the impacts of health crises are usually more severe on the areas where they emerge, with a low impact on international tourism activity.

The magnitude of the impacts will vary according to the severity and duration of the health crisis. According to the WTTC – World Travel and Tourism Council (2016), health crises have an average recovery time of 21.3 months, which is lower than a natural crisis, for example. The main reason for this is the fact that they do not disrupt tourist infrastructure or damage the natural, cultural, or historical landscape.

### 2.5.3. Human-made

Events such as wars, terrorist attacks, social unrest, crime, corruption, and political instability/turmoil, overtourism and pollution are examples of human-related crisis events with visible impacts on the tourism ecosystem.

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<sup>20</sup> Pongsiri, Montira J. et al, Biodiversity loss affects global disease ecology, *BioScience* 59: 945–54, 2009

**Table 5. Summary – main issue and impacts of Human-made crisis events (non-exhaustive)**

Human-made	
Main issue	Impacts
<p><b>Disruption of infrastructure</b></p> <p>Human-made crisis events can damage transportation, energy infrastructure, accommodation, food services, and tourism sites.</p> <p><b>Quality of resources</b></p> <p>Overtourism and pollution can impact the quality of the natural, cultural, and historical resources.</p>	<p><b>Decrease in overall tourist demand</b></p> <p>Tourists want to stay away from a war-torn destination or other human-made related crisis events.</p>
	<p><b>Increase in costs of the tourism ecosystem value chain</b></p> <p>Higher oil prices, transportation costs and commodity prices make air travel and package holidays more expensive.</p>
	<p><b>Increase of a variety of measures to provide greater security for civilians and tourists</b></p> <p>These measures, which can be temporary or permanent, result in changes to a variety of procedures regarding, for example, mass transportation facilities or places that attract large numbers of visitors.</p>
	<p><b>Financial losses</b></p> <p>Travel agencies have to cancel tours because of insufficient bookings and fear of liability suits. Consequently, they will promote other places instead.</p>

These crisis events can disrupt the perception of security and quality of the destination, which can take a considerable amount of time to rebuild, considering the event's severity. The consequences include the cancellation of bookings after the events take place or because the loss of quality becomes visible (e.g., through news about overtourism or pollution), decrease of demand, and loss of revenue. This has a ripple effect on the local tourism ecosystem's value chain.

Some crisis events, such as wars or terrorist attacks, also cause damage to tourism infrastructure as they can destroy energy facilities, tourism sites, accommodation, and transportation infrastructure, making them unusable or inaccessible.

They also impact several travel and tourist procedures as the impacted governments may decide to adopt measures to ensure higher security levels or quality assurance mechanisms for residents and tourists. These measures, which can be temporary or permanent, result in changes to various procedures regarding, for example, mass transportation facilities or places that attract large visitor numbers (e.g., access to the Eiffel Tower after the 2015 Paris attack). They can also be measures that impact the freedom and flexibility of tourist movements (e.g., limiting the number of people who can access specific city areas).

In case of security threats, governments in the tourists' countries of origin will also advise against travelling to the destination. Travel agencies will cancel tours

because of insufficient bookings and fear of liability suits, and they will promote other destinations instead<sup>21</sup>.

Although most of the impacts are restricted to the place of the occurrence (local, regional, national level), they can impact other levels as they challenge tourists' safety attitudes and beliefs.

Terrorism has been one of the most frequent crisis events over the last two decades. Although tourists are not the primary target of terrorist attacks, terrorism can still impact the sector due to the risk perception at a destination. A study by WTTC suggests that the average recovery time from a terrorist attack is 13 months.

Political turmoil and civil unrest can take many forms, including violence between domestic factions, mass protest movements, as well as coups d'états and uncertainty. Political instability or civil unrest is far more damaging to a tourism destination than one-off terror attacks. Unlike single terrorist attacks, manifestations of civil unrest or political instability often occur over an extended period, expanding disruption to the economy and strengthening the perception of instability at the destination<sup>22</sup>. The average recovery time from this type of crisis is 26.7 months<sup>23</sup>.

The severity of the crisis increases when we refer to wars. They can be more prolonged in time and their impacts are not limited to the regions/countries where they take place. They affect not only inbound, but also outbound tourism.

Overtourism has made headlines recently. It is defined as "the impact of tourism on a destination, or parts thereof, that excessively influences the perceived quality of life of citizens and/or quality of visitors' experiences in a negative way." Overtourism has several negative consequences, not only for the destination and its residents, but also for tourism. It can destroy the heritage of destinations, their nature, culture, and identity. This negatively affects the tourism experience and can lead to a decrease of interest and drop in demand.

### 2.5.4. Financial

Financial crises can be defined as inflation crises, sovereign debt crises, banking crises and stock market crashes (or a mix of these). They, generally, result in a loss of consumer confidence and alter the propensity to travel. Table 6 summarises the main issue and impacts of a financial crisis event.

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<sup>21</sup> Crises and Disasters in Tourism Industry: Happen locally - Affect globally, Zissis Maditinos, Christos Vassiliadis, 2008

<sup>22</sup> Crisis Readiness - Are You Prepared And Resilient To Safeguard Your People & Destinations?, WTTC, 2019

<sup>23</sup> COMCEC, Risk and Crisis Management in Tourism Sector: Recovery From Crisis in the OIC Member Countries, 2017

**Table 6. Summary – main issue and impacts of Financial crisis events**

Financial	
Main issue	Impacts
<p><b>Changes in purchasing power</b></p> <p>Tighter credit conditions, high consumer debt, decreased housing wealth, stagnant wages, and rising unemployment are some of the conditions that inevitably contracts demand for getaways and holidays.</p>	<p><b>Loss of consumer confidence</b></p> <p>Less propensity to travel.</p>
	<p><b>Decrease in overall tourist demand (particularly business travel)</b></p> <p>In general, tourists avoid spending money on travel and holidays during a financial crisis. The number of business trips decline because enterprises reduce their travel budgets.</p>
	<p><b>Direct effects on tourism expenditure</b></p> <p>The type of financial crisis may cause varying impacts on the purchasing power of some countries in relation to others, which can increase/decrease total expenditure at a destination.</p>
	<p><b>Financial losses &amp; unemployment</b></p> <p>They generate considerable financial losses due to the downturn of economic activity, which different business and sectors find difficult to overcome. The closure of businesses also leads to unemployment.</p>

In general, financial crises bring tighter credit conditions, high consumer debt, decreased housing wealth, stagnant wages, and rising unemployment – leading to a contraction in travel demand, particularly business travel. In fact, the number of trips made by EU tourists between 2007 and 2015 for personal purposes (leisure, holidays or visiting friends and relatives) remained roughly stable (at around 1 billion trips per year). On the other hand, the number of business trips declined, possibly because of a reduction in travel budgets and the fact that more sustainable, time and cost-efficient means of communication became widespread<sup>24</sup>.

The impact of financial crises on international tourism will eventually depend on the nature of crisis (such as whether it is an inflation, debt or banking crisis, or a mix of these). They can also have a stimulating effect on tourism. For example, the devaluation of a destination's currency will make tourism services cheaper, which can increase tourist flows to that destination.

Inflation crises have a depressing effect on inbound and outbound international tourism leading to a decline in tourism demand and spending. This occurs because high inflation leads to the loss of purchasing power. Stock market crashes decrease international tourist flows in destination countries, whereas their impact in the originating countries is not significant. Businesses cut back on travel expenses during a stock market crash, thereby reducing, for example, demand for high-end hotel rooms. Domestic debt crises lead to an increase in

<sup>24</sup> [How did the economic crisis hit tourism? - Products Eurostat News - Eurostat \(europa.eu\)](#). Eurostat, 2017



international tourism arrivals in the destination countries, whereas the demand for international tourism services declines in the originating countries<sup>25</sup>.

The effects of different financial crises on international tourism are region dependent, which means the impacts in different geographies are not symmetrical. In this regard, advanced economies have been much more affected than emerging ones.

The most significant financial event affecting international tourism since the millennium was the 2008/09 financial crisis and subsequent global economic slowdown. This resulted in a decline in international tourist arrivals and revenue decline of 4% and 6%, respectively, in 2009. It took 19 months for international arrivals, globally, to recover to pre-crisis levels. In Europe it took 29 months<sup>26</sup>.

### 2.5.5. Technological

The tourism ecosystem is no exception to a world increasingly marked by the use of technology. It is present throughout its entire value chain and in the simplest of activities, such as booking or paying. The generalisation of technology in the industry has created new challenges and it has caused new incidents that, if not mitigated, can lead to technological crisis.

Table 7 summarises the main issue and impacts of a technological crisis event.

**Table 7. Summary – main issue and impacts of Technological events**

Technological	
Main issue	Impacts
<p><b>Harm to Infrastructure &amp; Systems</b></p> <p>It damages infrastructure and systems, disrupting tourism activities.</p>	<p><b>Reputational Damage</b></p> <p>Technological events affect the reputation of a destination/company/service and customer trust. Considering that trust is one of the most important pillars of the tourism industry, such an event influences the choice of tourists and impact demand for a destination/business.</p>
	<p><b>Contraction in travel demand</b></p> <p>System failures or cyber-attacks can disrupt travel and booking systems, causing delays, cancellations, and loss of reservations. Also, system failures decrease the reliability/customer trust in the service.</p>
	<p><b>Increase in safety concerns</b></p> <p>There may be safety concerns for tourists, such as the risk of accidents occurring on different transportation modes (e.g., airplanes, ships) which all depend on the use of technology.</p>

<sup>25</sup> Khalid, U, Okafor, L, and Shafiullah, Muhammad. 2020. The effects of economic and Financial Crises on International Tourist Flows: A Cross-Country Analysis.

<sup>26</sup> The impact on international tourism of the Russian offensive on Ukraine. UNWTO, 2022

Technological	
	<p><b>Change of procedures</b></p> <p>It can disrupt business operation as it raises the awareness to re-think processes and procedures.</p>
	<p><b>Financial losses &amp; unemployment</b></p> <p>System failures or other types of technological events decrease the demand for a service, which can be particularly detrimental to SMEs and tourism businesses that rely heavily on some IT systems to attract customers.</p>

System failures or cyber-attacks can disrupt travel and booking systems, causing delays, cancellations, and lost reservations. One paradigmatic example is a failure of air traffic control systems: consider one of the main airports, handling thousands of flights every day, and the impact it would have if flights were suspended for a few hours. It would impact that airport, those flights, and the ones that followed, disrupting the entire tourism ecosystem. It would also have an impact on the destination's reputation and on customer trust.

The dematerialisation of payments and the growing concern with the protection of personal data has turned credit card and personal data into vulnerable elements. The loss of personal data, considering that trust is one of the most important pillars of the industry, can create a reputational damage that will influence the choice of tourists and impact on tourism demand for a particular destination or business.

Technological crises that affect a travel website or booking platform can also lead to a decrease in online bookings. This can be particularly detrimental to SME tourism businesses that rely heavily on online bookings to attract customers.

It is also important to highlight another type of crisis event arising from technological risk: modes of transport. In fact, the use of planes, ships, and trains (modes of transport very dependent on technology use), increases the risk of accidents. These crisis events have an impact on the destination causing reputational damage and increasing tourists' safety concerns.

Table 8 summarises some of the events that have marked the EU's panorama in the recent years and affected the tourism ecosystem. The annex ([Impacts of crisis events that have affected the EU tourism ecosystem](#)) provides detailed information about those impacts.

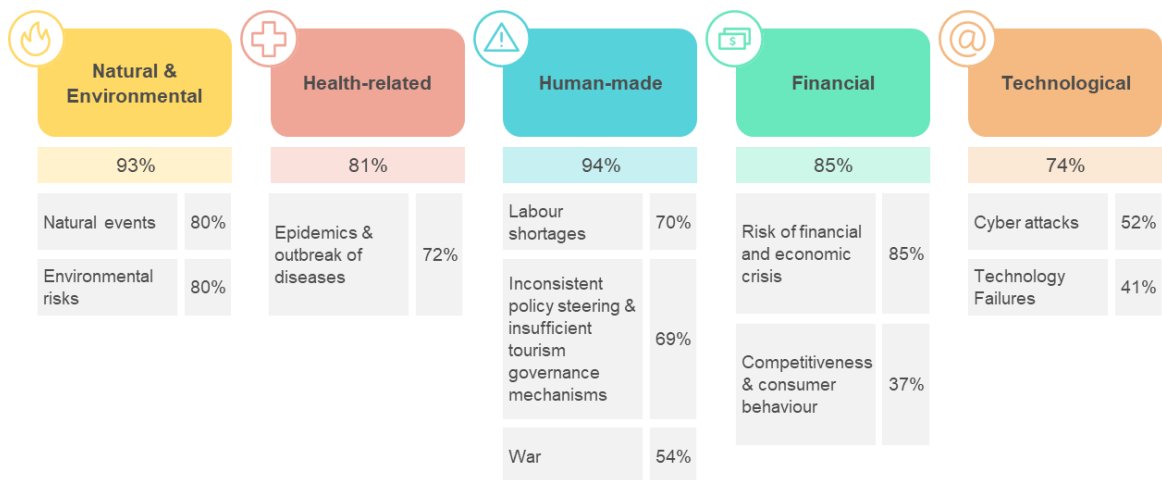
**Table 8. Impacts of crisis events that have affected the EU tourism ecosystem in recent years**

<b>Natural &amp; Environmental</b>	<p><a href="#">Iceland Volcanic Plume 2010</a></p> <p><a href="#">Pedrógão Grande Wildfires 2017 (Portugal Wildfires)</a></p>
<b>Health-related</b>	<p><a href="#">COVID-19 pandemic</a></p>
<b>Human-made</b>	<p><a href="#">Ukraine War</a></p> <p><a href="#">Paris Attacks 2015</a></p>
<b>Financial</b>	<p><a href="#">Global Financial Crisis 2008/09</a></p>
<b>Technological</b>	<p><a href="#">Costa Concordia 2012</a></p>

### 3. Main risks identified by destinations and sectors

There are different categories of risks that can impact the tourism industry: natural and environmental, health-related, human-made, financial, and technological. The analysis shows that although risks are context-specific and vary considering the type of destination, its characteristics and geography, there are some that are universally of concern for service beneficiaries.

The results of the risk assessment conducted by destinations and sectors that participated in the assistance service package indicate that the participants are aware of and concerned about the various risks that can impact their destinations.



**Figure 10. Overview of the risks most mentioned by selected service beneficiaries**

Figure 10 shows that risks in the natural & environmental and human-made categories were almost unanimously recognised as relevant by the service beneficiaries, with 93% and 94%, respectively, including them in their risk registers. Financial risks were indicated by 85%, health-related risks by 81%, and technological risks by 74% of the beneficiaries.

Delving into specific types of risks, 80% of service beneficiaries mentioned extreme natural events (e.g., floods, wildfires, volcanic eruptions, earthquakes) and environmental risks (e.g., climate change). Epidemics and disease outbreaks were the top health-related risk, noted by 72%. Labour shortages was mentioned by 70%, and inconsistent policy steering and insufficient tourism governance mechanisms by 69%. The risk of financial or economic crises was noted by 85%, and cyber-attacks were mentioned by 52% of the service beneficiaries.






	Impact (1-5)	Likelihood (1-5)
 Natural & Environmental	3.59	3.53
 Health-related	3.89	2.77
 Human-made	3.67	3.57
 Financial	3.47	3.44
 Technological	3.28	3.13

Figure 11. Overview of the average impact and likelihood <sup>27</sup> of risks considered by service beneficiaries

The assessment of risks faced by tourism destinations and sectors (figure 11) reveals a landscape where impacts are similarly significant across various categories. Health-related risks were perceived as having the highest impact, likely influenced by the recent pandemic. Human-made and natural & environmental risks are also deemed to have severe impacts. Technological risks are considered to have serious impacts. Such risks are probably currently underestimated, as destinations are only beginning to recognise the potential consequences of technological failures and cyber-attacks. The impact of technological risks is expected to increase as digitalisation continues to expand in the tourism ecosystem. It has the potential to paralyse sectors and destinations.

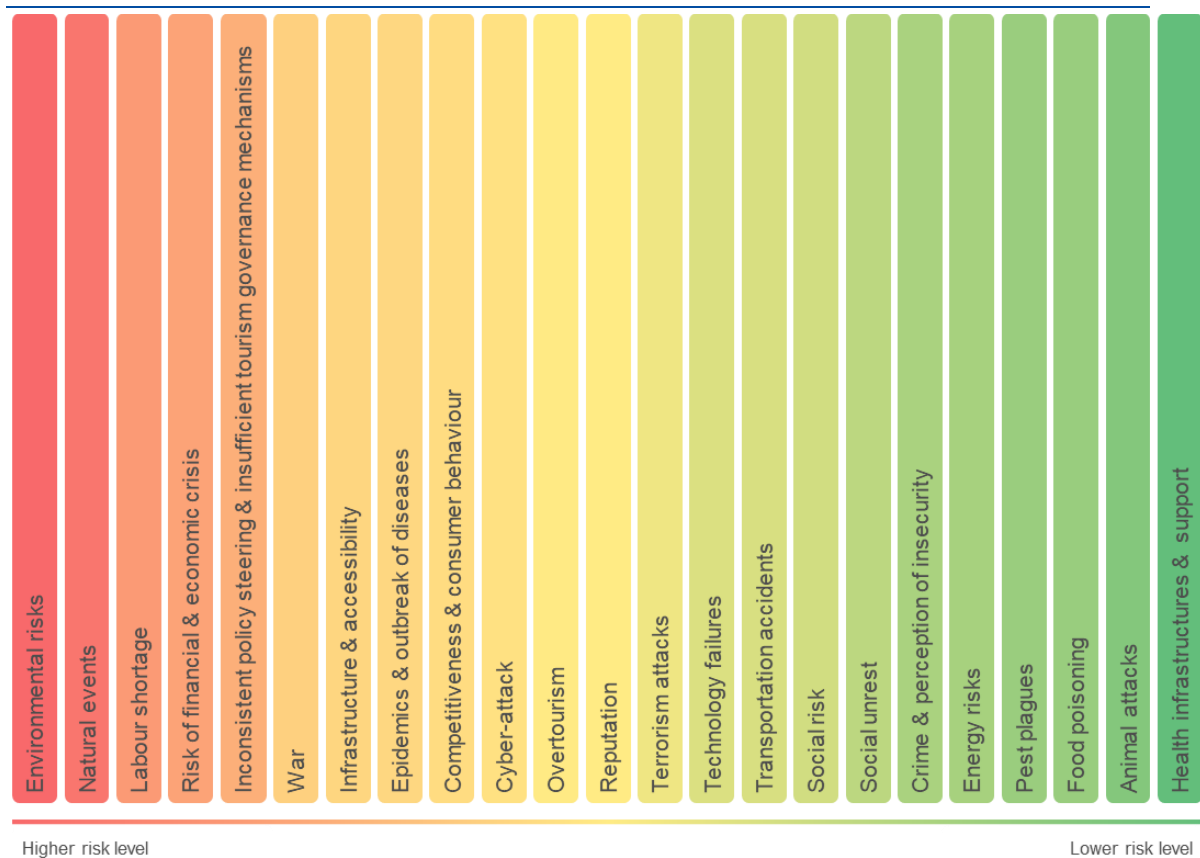
In terms of likelihood, natural & environmental and human-made risks are perceived as the most likely to occur. They include risks the EU tourism ecosystem is already experiencing, such as extreme natural events and climate change, or labour shortages, overtourism and war. At the other end of the scale, health-related risks are considered the least likely to occur, potentially due to the belief that another pandemic is unlikely to happen soon (figure 11).

The five risks that are of highest concern for tourism destinations and sectors, meaning the risks with the highest risk level (impact x likelihood<sup>28</sup>) are environmental risks, natural events, labour shortage related risks, risk of a financial and economic crisis, and inconsistent policy steering and insufficient tourism governance mechanisms (figure 12).

<sup>27</sup> Impact: 1 – minimal; 2 - significant; 3 – serious; 4 – severe; 5 – extreme;

Likelihood: 1 – very low; 2 – low; 3 – moderate; 4 – high; 5 – very high.

<sup>28</sup> The sum of risk level was considered, to avoid bias from averages based on a small number of respondents. This reflects the number of times each risk was mentioned, as well as its impact and likelihood. This made it the most representative measure of the risks of highest concern for tourism destinations and sectors.



**Figure 12. Overview of the risks that are of most concern to the tourism ecosystem**

Tourism is a **climate-sensitive sector** affected by a wide range of environmental factors. In this report, all the risks that impact natural living environments are grouped together as **Environmental risks**. This includes both environmental risks arising from climate change, such as changing temperatures and human-caused risks to the environment due to tourism activities, leading to loss of biodiversity and pollution. These are among the risks of highest concern for tourism destinations and sectors. This is in harmony with the main vulnerability<sup>29</sup> identified by service beneficiaries - 31% of them mentioned environmental vulnerability, encompassing high dependence on specific ecosystems such as forests, sea, mountains. The main fragility is that these ecosystems can be affected by climate change, pollution, and habitat destruction.

Climate defines the length and quality of tourism seasons and plays a major role in destination choice and tourist spending. It affects environmental resources that are critical attractions for tourism, such as snow conditions, wildlife productivity and biodiversity, water levels and quality. Air and water pollution also affect destinations, as they negatively impact the quality of tourist experiences. Pollution also harms the local ecosystem, threatening the biodiversity and the attractiveness of destinations.

<sup>29</sup> generally referred to as an indication of the degree to which a system (destination and/or organisation) is susceptible and unable to cope with the adverse impacts of short-term or long-term shocks. It encompasses factors that increase the likelihood or severity of adverse consequences.

**Extreme natural events**, such as wildfires, heavy rains, droughts, and volcanic eruptions are also among the top concerns. This reflects the recurrence of these events, with all destinations having experienced at least one. Their high likelihood and destructive potential can severely damage transportation infrastructure (e.g., bridges, airports), accommodation, food service establishments, landmarks, and natural attractions (e.g., beaches, parks, trails, wildlife habitats). In the short-term, these events can significantly impact destinations and tourism businesses due to high recovery costs and the inability of tourists to visit and navigate in these areas. In the long-term, they can diminish a destination's attractiveness and create a negative perception.

**Labour shortages** is also a main concern as demand for tourism professionals continues to increase. This shortage can place the normal functioning and competitiveness of the industry, quality of services and operational efficiency at risk, which in turn affects the visitor experience and overall competitiveness of the destination. Layoffs and significant industry changes experienced by tourism workers during the COVID-19 pandemic have aggravated this situation.

The **risk of a financial or economic crisis and inflation** is also a major concern for tourism destinations and sectors. Such crises generate tighter credit conditions, high consumer debt, stagnant wages, decreased disposable income, and rising unemployment, all of which reduce tourists' propensity to travel and spend. Business travel is also impacted by reduced company travel budgets, leading to a direct decrease in overall tourist demand and expenditure.

**Inconsistent policy steering** is a significant concern for destinations and sectors. The unpredictable environment characterised by shifts and changes in national and regional politics influences the way tourism organisations operate, as it can hinder their ability to develop policy, implement regulations and support sectors.

**Insufficient tourism governance mechanisms**, including lack of support and policies to address tourism needs, coupled with a lack of coordination among stakeholders, can also harm the tourism ecosystem. Effective tourism governance requires comprehensive policies that foster sustainable growth, provide financial and technical support, contribute to product and infrastructure development, and ensure the protection of natural and cultural resources. When governance falls short in these areas, it can lead to reduced investment, economic challenges, sustainability issues, and coordination problems within the tourism ecosystem and coordination with other policy areas such as transport, entrepreneurship, and labour policies.

**Overtourism** is a growing concern as destinations face unsustainable levels of tourist arrivals and the related pressure on local infrastructures, resources, and communities. This issue is closely tied with infrastructure and accessibility deficiencies and can lead to several other risks like environmental degradation, cultural erosion, and resident dissatisfaction.

The referred risks are context specific, and they can vary according to the:

### Type of Destination

When analysing the risks by **type of destination** (urban, rural, coastal, island and mountain), although they generally share similar concerns, some differences stood out.



Figure 13. Overview of the top risks that most concern destinations according to type

As indicated in figure 13, **environmental and natural risks are amongst the top four of main concern for all types of destinations.**

**Coastal destinations and islands**, areas of high tourism intensity and dependency, share similar concerns due to their highly reliance on natural assets – water, beaches, coastlines. These natural assets can be severely impacted by **climate change** (e.g., rising sea level) and **natural events** (e.g., storms, coastal erosion). They are also very dependent on the length and quality of the seasons.

**Overtourism** was one of the risks that stood out in coastal destinations, mainly in Southern European destinations, such as Greece, Spain, and Croatia. These destinations are already experiencing significant challenges due to an excessive tourist influx.

**Infrastructure and connectivity related risks** are critical concerns **for islands**. These destinations depend heavily on the aviation industry and air connectivity and any disruption in this sector or in key tourism infrastructures, such as airports, can significantly impact them. That is why strengthening the relationship between their governance structures and the aviation industry is of utmost importance.



**Labour shortages** are a primary concern for three out of the five types of destinations, **particularly coastal and island destinations**. This challenge is aggravated for islands by their insularity, low population density, and difficulty in attracting and retaining staff for the tourism industry. The same difficulty is visible in rural areas, where labour shortages are also identified as a major concern.



#### The Azores, Portugal

**Destination; Regional; Island; DMO; Operational; labour shortages; seasonality**

Several destinations are dealing with **labour shortages** and with the lack of qualified and skilled workers. This situation is starker in the Azores, an archipelago in Portugal, because of its remote location. They are not only dealing with the lack of human resources but also with a lack of qualified workers, which can affect the quality-of-service delivery.

Furthermore, the **seasonality** the destination faces also adds to the problem, as in the peak seasons it is even more difficult to meet the demands of the tourism ecosystem.

**Urban destinations consider the risk of a financial and economic crisis as their main concern.** At first, it was expected to occur in destinations with a higher dependency on tourism activity, such as island and coastal areas (which have also considered this as one of the five risks of most concern). This is due to the potential in-depth impact of economic fluctuations, loss of purchasing power, and decreased tourist demand and expenditure. However, **and as past crisis have shown us, business tourism**, the primary market for many urban destinations, **is more impacted (and takes longer to recover) than leisure tourism.** Additionally, urban destinations often have a diverse economic base, making them more sensitive to broader economic fluctuations. A financial crisis can impact multiple sectors in an urban economy, not just tourism, thereby amplifying the overall risk. **These were also the destinations that were more concerned with political instability and war.**

**Rural destinations have considered natural risks as being of utmost concern.** These concerns take into consideration the high likelihood and severe impacts caused by events such as wildfires (mostly), but also storms and floods which have a tremendous impact on their main tourist resources - natural resources.

**Insufficient tourism governance mechanisms** are also referred by these destinations, mainly located at regional and local levels. They are concerned that regional and local organisations may lack the mandate or capacity to effectively support the tourism ecosystem in resilience building and crisis management, in areas such as technical and financial support, training, data and insights. There are also difficulties in horizontal and vertical coordination, which can hinder the development and management of tourism activities.

Although mountain destinations were not heavily represented among the service beneficiaries, some inferences can be drawn from national-level data. **Mountain**

**destinations are primarily concerned with the impacts of climate change**, which can lead to a lack of snow and reduced quality of ski seasons, thereby affecting winter sports tourism and associated businesses. The risk of avalanches and animal attacks, along with the negative perception these events create among tourists, are also significant concerns. Since mountain destinations are usually rural areas, they mentioned similar governance risks to those of rural destinations.



#### Region High Tatras Tourism Board

##### **Destination; Regional; Mountain; DMO; Promotional; natural events; climate change**

Climate change is also affecting the snow destinations. High Tatras, a mountain range in Slovakia, well-known for winter sports and its ski resorts, is particularly concerned about some risks that might affect their tourism activity.

They are concerned about the snow security (ability to maintain snow conditions: both lack of snow and snow removal), avalanches and heavy winds. They are also concerned with potential animal attacks (bears, wolves) and what this could mean for the perception of safety of their destination.

All of these can severely impact the inflow of tourists in the winter season and affect their economic and tourism activities.

## Geography

Some differences stood out considering the geography of the destinations, although they generally share similar concerns.

**Labour shortages** are concerns for destinations across all of Europe. The increasing demand for tourism workers is independent of the geographical location of the destination, since tourism activity is very intensive in Europe.

**Natural and environmental risks are top concerns for most areas in Europe.** Nevertheless, they are of more concern for destinations in south and central Europe. Southern European destinations are more concerned with events such as wildfires, droughts, coastal erosion, and climate change. Central European destinations, while less affected by coastal issues, face risks such as floods and wildfires. This region also encompasses major mountain areas and natural parks that can be significantly impacted by natural events and climate change.



### Turismo do Algarve, Portugal

**Destination; Regional; Coastal; DMO; Operational; natural events; high dependency on tourism**

The south of Europe, with longer summers and lack of rain, has a high risk of water shortages and drought situations.

The Algarve, in the south of Portugal is particularly concerned with this scenario: last year they went through one of the longest droughts ever, with water reserves hitting record lows and at risk of there not being enough water to guarantee public supply.

Water shortages in this region, which is highly dependent on the tourism sector, might severely impact the tourism activity as water may have to be rationed (timed baths, limitations for water parks and swimming pools, etc.).

**The risk of a financial & economic crisis was also referred to as a top concern for most European destinations.** It was of most concern to Southern Europe destinations as they are more dependent on tourism. Furthermore, according to the analysis, the Southern Europe destinations are also those most vulnerable to shocks in the ecosystem. This is because they are more seasonal destinations, with higher dependency on tourism, higher tourism intensity and more dependent on the main source markets.

**Southern European destinations have also highlighted overtourism** as a major risk, as it is already impacting them. This includes pressure on resources and infrastructure, dissatisfaction among residents, and a negative perception among tourists resulting from media coverage and word-of-mouth.

These destinations, such as Italy and Greece, also mentioned **inconsistent policy steering** as a relevant risk. The lack of support to the ecosystem due to insufficient tourism management along with the lack of coordination and effective policies add additional strains to their already challenging environment.

Not surprisingly, **war** was the risk of most concern to **Northern and Eastern European destinations**. Some of these destinations are experiencing significant spillover effects from the **war**, impacting tourism activities. During the pandemic in 2020, Russia and Ukraine together accounted for 3% of global spending on international tourism in the EU, as source markets. The importance of both markets is significant for neighbouring countries to Russia\*, but also for some sun and sea destinations, such as Cyprus\*\*. Many direct international routes from east to west have become impossible due to the conflict, forcing airlines to fly further north or south. This has caused countries like Finland, which was a hub for the east, to lose their competitive advantage, as flights can no longer cross Ukrainian and Russian airspace.

 **\*Estonia, Latvia & Lithuania**

**Country; National; Island; war; Russian tourists; high dependency on tourism**

Neighbouring countries to Russia, like Estonia, Latvia, and Lithuania, have not yet recovered their overnight guests after the pandemic, with Estonia having 91.5% of their previous guests (vs. 2019), Latvia, 79.3% and Lithuania 94.7%.

It is important to note that Russian tourists, who in 2019, accounted for 7.5%, 10.7% and 5.1% of their international guests, respectively, have dramatically reduced their share since the invasion of Ukraine. They accounted for 0.6% in Estonia, 0.8% in Latvia and 0.3% in Lithuania, in 2023, which contributes to the unrecovered international tourist numbers.<sup>30</sup>

 **\*\*Cyprus**

**Country; National; Island; war; Russian tourists; high dependency on tourism**

Cyprus faced a significant drop in Russian tourists due to the war in Ukraine. In 2021, Russian tourists accounted for 29% of arrivals on the island. In 2023, the percentage of Russian tourists in Cyprus was 2.5%, an absolute decline in tourists of more than 26% (> 2M)<sup>31</sup>.

Nevertheless, the island achieved the impressive recovery of its tourism industry, almost reaching pre-pandemic levels. They did this by attracting more visitors from other countries, especially France, where arrivals surged by 99%. The Cypriot government worked to diversify its tourism offer and improve air connections with Europe, helping to offset the decline in Russian visitors. Promoting charming villages and increasing flights by low-cost airlines played a key role. Despite some challenges, including strikes in France, Cyprus' efforts paid off, leading to a stronger-than-expected rebound in tourism.<sup>32</sup>

 **Visit Kristinestad, Finland**

**Destination; Local; Coastal; DMO; Promotional; war; perception of safety and security**

The Russian attack on Ukraine hit Finland particularly hard, especially in terms of travel and tourism. With the borders closed and sharing a very long physical border with Russia, fewer tourists are coming in. The perception of safety, security and trust among travellers took a hit.


There is also a significant increase of Ukrainian refugees, which brings both challenges and benefits. These benefits include filling jobs in the hospitality sector. Visit Kristinestad mentioned that the Ukrainian refugees already represent 10% of their population and greatly contribute to the hospitality sector, working in housekeeping and in restaurants. Finland also lost its competitive advantage as a hub for the East with the flight restrictions over Russian airspace. It is currently not accessible by train for international travellers.

<sup>30</sup> [Statistics | Eurostat \(europa.eu\)](#)

<sup>31</sup> [Statistics | Eurostat \(europa.eu\)](#)

<sup>32</sup> [Cyprus tourism: EU's strongest recovery in 2022, despite loss of Russian market | CBN](#)

Destinations can also face the additional threats of **terrorism** and **cyberattacks** that bring security concerns for the tourism actors.

 **KŠTM Sevnica, Slovenia**

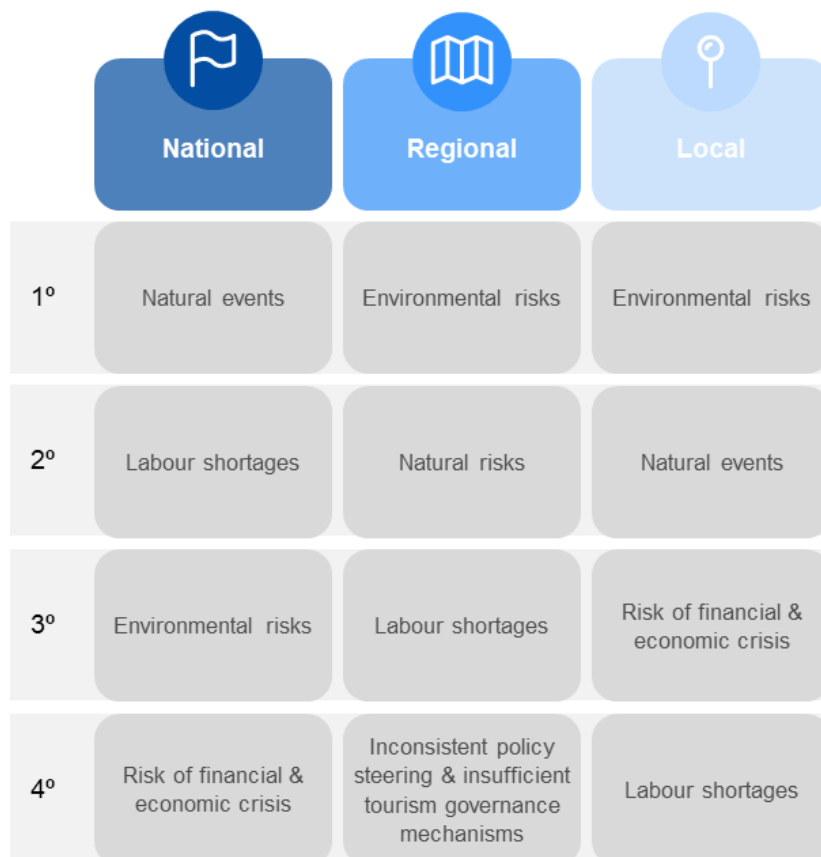
**Destination; Local; Rural; DMO; Operational; cyber risks; digitalisation**

A considerable number of service beneficiaries have expressed their concerns regarding cyber risks and the digitalisation of services. For example, KŠTM Sevnica, in Slovenia, is not only concerned about a possible cyber-attack to its destinations and all the constraints this might entail, but also with system malfunctions. These malfunctions include failures in the electricity system, TV and radio, internet, and mobile telephones, pay card and payment systems, etc.

This can severely impact their ability to operate and can therefore affect the tourism activity.

**Level**

The same pattern applies when analysing the risks by **level of the destination** (national, regional, and local). However, there are some changes worth noting (figure 14).



**Figure 14. Overview of the top risks that most concern destinations according to their level**

All levels have natural, environmental, and labour shortages risks as their risks of greatest concern.

**Regional level destinations**, important players in bridging between national and local level destinations, are especially concerned about governance issues. As mentioned before, regional level organisations fear they may lack the mandate or capacity to effectively support the tourism ecosystem. Unfavourable policy and a lack of long-term planning often hinder their daily activities. Moreover, they highlight the lack of coordination, role definition and communication as significant concerns.

**Local-level destinations** also highlight infrastructure and accessibility as primary concerns, as they are often the most affected. These areas typically face challenges with mobility, connectivity, and accessibility, making them more vulnerable to disruptions in tourism infrastructure. Limited resources further hinder their ability to recover from such impacts.

The threat of war and the geopolitical situation in Europe is something referred by all levels, but of highest concern to the national level.

### Type of mandate

Natural and environmental risks and labour shortages are of highest concern to organisations with different types of mandate (figure 15).



**Figure 15. Overview of the top risks that most concern different types of service beneficiaries**

Organisations with **legislative power** are the ones most concerned with changing political priorities, as these can disrupt already ongoing policy-making

processes and governance structures. Insufficient tourism governance mechanisms to support the tourism ecosystem also concern them.

Organisations with **operational mandates**, closely involved in the tourism ecosystem, highlight two significant risks for tourism businesses: labour shortages and the risk of financial and economic crises. Labour shortages, especially in skilled positions, can significantly impair operational capacity and service quality. Similarly, financial stability and support are crucial for the overall health of the ecosystem.

Organisations with **promotional mandates** are the ones most concerned with risks that affect destination attractiveness and competitiveness. These include changes in consumer behaviour, brand and reputation, risk of fake news and negative headlines/media messages.

**Industry associations** are concerned with insufficient tourism governance, including poor collaboration between the public and private sector and the insufficient technical and financial support provided by public sector to tourism businesses to develop resilience and to respond to crises (e.g., to improve capacity, improve skills, digitalisation). Increasing competitiveness and changing consumer behaviour is another risk of highest concern, as it requires tourism businesses to earmark extra effort and resources to cope with change.

## 4. Most common strengths, weaknesses, opportunities, and threats identified in the context of crisis management

The crisis management situational assessment made by the selected tourism destinations and associations, provides the project with an overview of the most common strengths, weaknesses, opportunities, and threats identified in the tourism context of crisis management (figure 16).

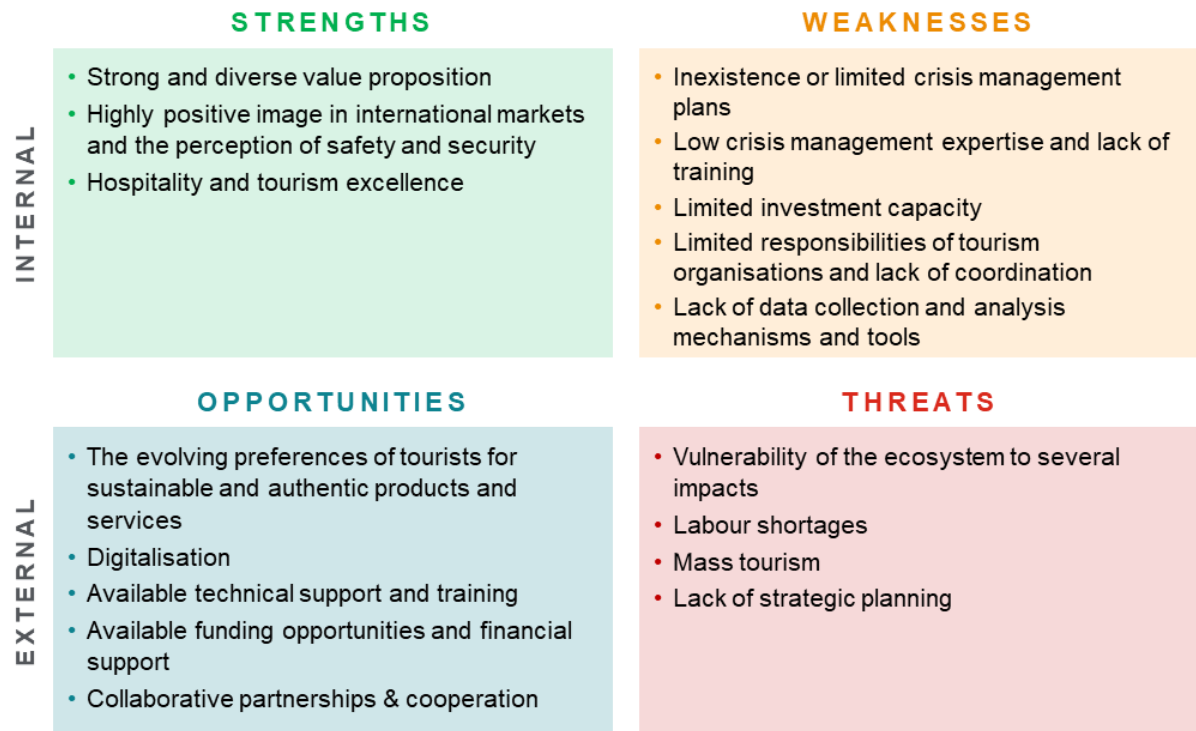


Figure 16. Analysis of most common strengths, weaknesses, opportunities, and threats of European destinations and sectors

### Strengths

The **strong and diverse value proposition of European destinations**, which includes unparalleled natural, cultural, and historical assets & resources, provides them with a competitive advantage, placing them amongst the world’s top destinations. Notably, 80% of the selected service beneficiaries highlighted these attributes. This contributes to an increase in the resilience of the local tourism ecosystem, by enabling the diversification of the **tourism offer** and the creation of diverse trips and complementary tourism products. Moreover, when a crisis hits, impacting certain assets or resources, it will allow the destination to re-focus efforts to other existing tourism offers. It can also act as a solution to overtourism, allowing the pressure on certain points to be alleviated by dispersing tourist flows to different tourism attractions.



Considering the different types of service beneficiaries – geographical location, type of destination, and the level and mandate of the organisation – this was a top strength for all, except islands and destinations in the north of Europe. Islands considered their positive image and perception of safety as their main strength. As insular destinations, they believe that offers unique appeal to tourists, away from the complexities and uncertainties often associated with the mainland or more geopolitically sensitive regions. This geographical separation inherently reduces exposure to geopolitical conflicts and related disruptions. The Northern European destinations emphasized the established collaborations and partnerships, particularly highlighting the new coordination structures developed in response to the challenges posed by the COVID-19 pandemic.

European destinations in general benefit from a **highly positive image** in international markets (referred by 60% of service beneficiaries). They are widely recognised for their high-quality products, high standards, and numerous certifications and awards. Moreover, they are seen as **safe and secure destinations**, a factor increasingly valued by tourists today. This reputation for safety and security provides a significant competitive advantage for attracting tourists.

The **culture of hospitality** that characterises European destinations is another of their greatest strengths. The welcoming nature of residents and tourism workers lays the foundation for a positive visitor experience. This culture of hospitality is supported by a **qualified workforce that is well-educated in tourism and hospitality**. This excellence is sustained by a **strong educational and training ecosystem**. It ensures that tourism professionals have the skills and knowledge necessary to deliver exceptional service and enhance the overall tourist experience. This is most prevalent in Southern Europe's destinations which have highlighted their exceptional hospitality and tourism excellence, along with their image as safe destinations. It makes them far removed from the geopolitical tensions in Eastern Europe. This provides them with a competitive advantage, making them particularly appealing to tourists seeking security and a welcoming atmosphere.

## Opportunities

The **evolving preferences of tourists towards sustainability, slow tourism, rurality, and authenticity**, along with the growing desire to explore untapped destinations, present a significant opportunity for the tourism ecosystem to build resilience. This was identified by 70% of the service beneficiaries. This shift is particularly relevant for rural and mountain destinations, which naturally offer the products and experiences that align with these emerging trends.

These preferences encourage destinations to preserve natural, cultural, and historical assets and to develop sustainable and authentic tourism products and services, with the potential to mitigate environmental risks. It also presents an opportunity to foster regional and local development, relieve pressure on main

urban areas, and combat overtourism. Destinations can enhance their attractiveness by developing value propositions that meet these evolving preferences. This helps build resilient and sustainable destinations that support local economic, social, and environmental goals.

**Big data and digital tools** can enhance destinations' capacity to collect, analyse, and share data, which is critical in crisis management. These tools enable early prediction of crisis events and facilitate better responses by providing real-time and relevant data. This capability significantly improves a destination's readiness and resilience, allowing for more effective handling of unforeseen events.

Moreover, leveraging **modern communication technologies** plays a crucial role in crisis management within the tourism ecosystem. **AI-driven chatbots and social media platforms** are increasingly used for rapid and effective communication during crises. These tools can significantly improve response capabilities by providing timely information to tourists and stakeholders, thus fostering trust among them.

Sixty percent of service beneficiaries highlighted these topics related to **digitalisation**. These opportunities are particularly embraced by islands and destinations in the south of EU. Such destinations have high tourism intensity and can benefit from digital tools and insights to improve destination management. Notably, organisations with operational and promotional mandates identified digitalisation as a key opportunity, recognising its potential to improve both management efficiency and promotional effectiveness.

**The available technical support and training** opportunities are transversely recognised as crucial for enhancing resilience within the tourism ecosystem. Service beneficiaries, particularly those from coastal destinations, have identified this as a key opportunity. They have mentioned that the specialised assistance programmes from organisations and advisors throughout the EU (such as this one), or national programmes, provide invaluable resources. These initiatives offer insights into best practices and lessons learned in crisis management, drawn from real-life experiences across different countries. Moreover, increased collaboration with academia further enriches this knowledge base, facilitating the development of tailored courses and educational programmes focused on crisis preparedness and management.

The available **funding opportunities**, such as the Recovery and Resilience Facility (RRF), National and Regional Strategic Reference Frameworks for 2021-2027, and Interreg, are an opportunity for the tourism ecosystem to enhance resilience and crisis management preparedness. This funding offers substantial resources for various initiatives (e.g., infrastructure development, product development, digitalisation). Moreover, these funding opportunities can support the implementation of comprehensive training programmes and crisis management initiatives. Destinations can significantly improve, as mentioned

above, their ability to respond to and recover from crises, by investing in education and technical training for tourism professionals.

Cross-border professional associations have highlighted the available funding opportunities, particularly those targeting SMEs, as a significant opportunity. Funding for businesses and SMEs can greatly enhance their resilience, capacity building, and crisis management preparedness. This financial support is essential for these businesses to develop the necessary skills and infrastructure to thrive in a competitive and ever-changing tourism landscape.

Another opportunity identified by the service beneficiaries is the **recognition of collaboration and cooperation as key factors** for enhancing crisis management capabilities. The establishment of collaborative **partnerships** with neighbouring municipalities, local actors, private institutions, and international organisations strengthens crisis management networks and facilitates coordinated responses during emergencies. The promotion of **cross-sector collaboration** with emergency services, civil protection, healthcare providers, and local communities also strengthens destinations' crisis response capabilities. This has been further developed since the COVID-19 pandemic. Finally, fostering **public-private cooperation** between public authorities and tourism businesses facilitates information exchange, resource mobilisation, and joint initiatives for crisis preparedness and recovery efforts.

Investing in knowledge sharing initiatives, crisis simulation exercises and training is a great opportunity to enhance crisis preparedness and response skills among tourism and emergency services personnel. Additionally, conducting comprehensive risk assessments and developing contingency plans for various crisis scenarios also enables proactive mitigation measures and action, minimising disruptions to tourism activities.

Urban destinations have pointed out significant opportunities for new infrastructure and improved accessibility. The construction of new roads, airport upgrades and other improvements enhance mobility and connectivity, which are important to receive more tourists and tap into new source markets.

A final remark refers to the fact that **while some destinations are highly concerned with geopolitical risks and climate change, others see these challenges as opportunities**. Southern European destinations are targeting tourists who previously visited regions now affected by or close to conflicts. Similarly, Northern, and Eastern European destinations are leveraging climate change and extreme heat to attract tourists seeking cooler climates.

### Weaknesses

Service beneficiaries recognised the **inexistence of or limited crisis management plans** as their main weakness. Most crisis management procedures are not documented, resulting in a lack of clear communication protocols and organisation structures or roles for handling crises. Even when

there is good cooperation with other stakeholders, the absence of documented procedures for crisis situations limits the effective response and coordination.

Furthermore, tourism **crisis management is often not integrated into the overall crisis management plans** of destinations. There is no systematic risk sensing or evaluation of potential risks specific to tourism, leaving destinations unprepared for unexpected events. This makes the tourism ecosystem more vulnerable to disruption, as it lacks the necessary frameworks to effectively identify risks and to prepare, manage and mitigate any crisis.

This was of particular concern for organisations at the national level with legislative and operational mandates since they have the primary responsibility to engage with the various levels to develop crisis management plans. National-level organisations recognised the critical importance of preparedness and the potential widespread impact of crises. They understand that without a robust national framework, the regional and local levels lack the necessary guidance and support to effectively manage crises.

The **low level of crisis management expertise and lack of training** is recognised as another critical weakness. Many destinations, mostly at the regional level, suffer from a shortage of personnel with the necessary skills, know-how, and the organisational structure needed for effective crisis management. This is also evident in SMEs, which often lack the resources to develop these capabilities.

Additionally, there is a **general lack of awareness about risks and crises among tourism stakeholders and politicians**. This shortage contributes to a deficiency in crisis management expertise, making it challenging to formulate and implement comprehensive crisis management strategies.

Service beneficiaries have also identified the **limited investment capacity of tourism organisations**, particularly of regional and local DMOs. These organisations, with limited budgets, heavily leveraged by EU, national, and regional funding, often prioritise resources for product development, destination management, and promotion, leaving crisis management underfunded. This challenge is even more pronounced in countries/regions with lower tourism activity, such as some Eastern European destinations, where tourism is not a priority and financial support is minimal.

**SMEs**, which are vital to the industry, also **struggle with financial constraints**. Many are still recovering from the financial impact of COVID-19, having taken loans to survive the pandemic. This financial burden makes it difficult for them to invest in necessary crisis management resources, leaving the tourism ecosystem vulnerable and less resilient to future disruptions.

**Tourism governance and coordination**, particularly in times of crisis, is another weakness the tourism ecosystem faces. This was predominantly reported by Southern European and coastal destinations. There is often a lack of clear

responsibilities and mandates, resulting in fragmented responsibilities and grey areas where no single entity takes charge. NTOs and DMOs frequently have limited responsibilities, leaving them unable to effectively support the tourism ecosystem. Coordination is another critical challenge, with a low level of cooperation among territorial actors and between the private and public sectors. Tourism organisations often struggle to coordinate their efforts horizontally, vertically, and sectorally. This lack of coordination leads to inefficient responses and hinders the ability to manage crises effectively.

Finally, many destinations face significant challenges in **data collection and analysis**. The data they collect is often too broad or outdated to be useful, due to insufficient granularity and periodicity. Moreover, the potential of big data remains largely untapped, as many organisations lack the necessary mechanisms for effective data collection and analysis. This issue is compounded by a lack of advanced systems and technology, along with limited resources to invest in private data sources that could fill these gaps.

Additionally, the tourism ecosystem suffers from a noticeable **absence of open data platforms**, which would enable information sharing among the various stakeholders. The public and private sectors often operate in silos with minimal data exchange, hindering comprehensive analysis and informed decision-making. This fragmentation not only limits the ability to promptly identify and respond to trends and risks, but also undermines the overall resilience and competitiveness of the tourism industry.

Additional weaknesses that have not been previously mentioned but are relevant to specific groups within the tourism ecosystem also need to be highlighted. Islands have identified **accessibility and connectivity** as their primary weakness, reflecting their high dependency on air transport. Conversely, rural destinations face a different challenge since their main weakness are the **limited tourism facilities and infrastructure**, which limits their growth potential.

Organisations tasked with promotional mandates have highlighted weaknesses that impact destination attractiveness and competitiveness, including inadequate tourism facilities and offers, as well as **weak destination branding and identity**. Industry associations have pointed out broader concerns affecting the business aspect of the tourism industry such as labour shortages, insufficient data, and limited investment capacity.

### Threats

**Tourism is vulnerable to several risks** - environmental, health-related, social, political, financial, and technological – that can seriously impact the sustainability and resilience of its ecosystem, as referred to by 70% of service beneficiaries. Destinations, especially those highly dependent on tourism and on limited or seasonal source markets, are particularly vulnerable to crisis events due to their

economic reliance on tourists and the need to keep a positive image of attractiveness and safety.

Islands, for instance, have identified increased competition among tourism destinations and the risk of economic and financial crises as their primary threats. These destinations, given their high dependency on tourism, are vulnerable to economic fluctuations, inflation, and changes in purchasing power, all of which can deeply impact their tourism ecosystem. In contrast, Eastern and Northern European destinations have identified the ongoing geopolitical instability as the primary threat to their tourism ecosystem.

As tourism becomes increasingly hypermobile and the global economy more interconnected, the **potential impacts of crisis** events on tourism are expected to intensify in both frequency and magnitude. This heightened mobility increases the speed at which crises can spread across regions, amplifying the economic and reputational risks faced by destinations. It is even more important to maintain a positive image of safety and security as destinations navigate these complex challenges. Developing robust strategies to mitigate these vulnerabilities is essential for safeguarding the long-term sustainability and resilience of the tourism ecosystem worldwide.

**Labour shortages**, as mentioned before, are a significant threat to the tourism ecosystem. Service beneficiaries face ongoing challenges in attracting and retaining qualified personnel, which limits their ability to meet demand effectively, especially during peak seasons. This shortage not only impacts operational efficiency but also hinders growth potential and service quality, ultimately reducing the sector's capacity to consistently provide tourists with a positive experience. This concern was particularly highlighted by rural destinations, which face difficulties in recruiting and retaining staff, exacerbated by limited budgets that hinder resilience building and crisis preparedness efforts. Coastal destinations, with high tourism intensity and seasonal peaks in demand, also emphasized labour shortages as a critical threat.

**Mass tourism** poses a serious threat causing overtourism, depleting resources, and eroding cultural identity and authenticity. This was most referred by coastal destinations in the south of the EU, as the influx of tourists overwhelms local infrastructure, strains natural resources, and exceeds capacity. This strain can degrade environmental quality, diminish cultural heritage sites, and undermine the unique experiences that attract visitors. Balancing tourism growth with sustainable practices is essential to mitigate these impacts and ensure that destinations maintain their appeal and preserve their cultural and natural assets for future generations.

The **lack of strategic planning is another critical threat** to destination management in general, and for the capacity to manage crisis situations. Without long-term strategic planning, destinations may struggle to receive the necessary support and resources to take action to enhance resilience and crisis

management preparedness. This includes crucial tasks such as risk assessment, scenario planning, and integrating crisis management plans into the overarching tourism strategy. Moreover, it limits coordination, communication, and effective governance, which are essential for cohesive and proactive management.

Finally, Central European destinations perceive inadequate governance, policy, and regulation as the primary threat to the tourism ecosystem, hindering tourism development and crisis response agility, due to excessive regulation and bureaucratic processes.

## 5. Key challenges recognised for different governance models

Tourism policies and regulations in the European Union (EU) are the responsibility of individual Member States, and in some cases, they are managed at regional and local level. The EU competence in tourism is based on the Treaty of the Functioning of the European Union, Article 195. This article states that EU-level action should be aimed at encouraging the creation of a favourable environment for the undertakings of the sector, and promoting cooperation between Member States, particularly through the exchange of good practices.

This means that the key decision-making levels for developing tourism in the EU are the Member States, regional and local authorities, based on their regulatory structures. This poses a **challenge for EU level coordination as the 27 Member States may have very different approaches to managing tourism and dealing with crisis events.**

The transversal nature of tourism results in an EU tourism ecosystem composed of several types of organisations. As presented in figure 17, there are several actors and stakeholders involved in tourism governance at the EU level, including organisations from three of its institutions – the European Parliament, European Council and European Commission. Some of these organisations have relevant roles in crisis preparedness and management such as the Committee on Transport and Tourism (TRAN Committee, European Parliament) and the Tourism task force (TTF), the Competitiveness Council (COMPET), the Integrated Political Crisis Response Mechanism (IPCR), Tourism Advisory Committee (TAC) and DG GROW.

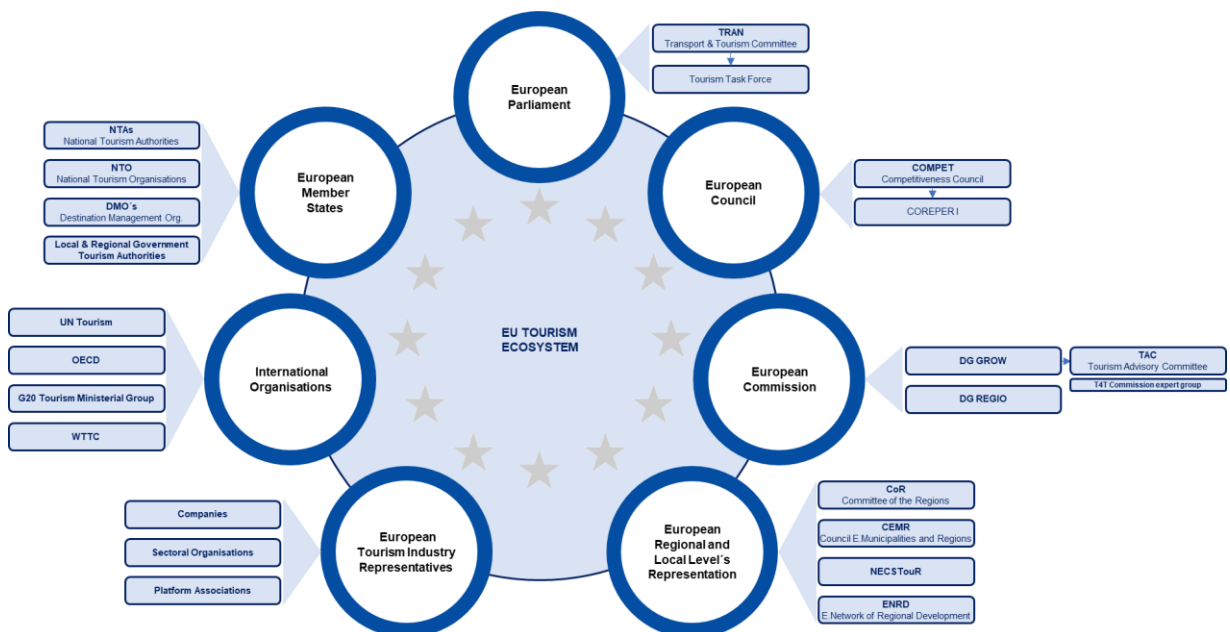


Figure 17. EU-level overview of the Tourism Ecosystem’s key actors and stakeholders



The tourism ecosystem is characterised by its diversity, encompassing eight different sectors, and with SMEs comprising 99.9% of the ecosystem's actors. The effects of crisis events impact differently on each sector and a variety of actions are required to fulfil the specific needs of each one. This **diversity of stakeholders can make it challenging to develop a coordinated approach to tourism governance and crisis management. It also poses difficulties in establishing a unified tourism voice within various crisis management structures and bodies.**

The responsibility of developing, promoting, and regulating tourism varies across EU countries, depending on factors such as the system of government<sup>33</sup>, the importance of tourism for the economy or the nature of tourism demand. EU Member States have different approaches to managing the governance of tourism-related responsibilities, from an institutional perspective. Four basic approaches were identified:

- 1) Tourism is positioned within an economic ministry closely linked with economic growth, which is the case in many EU Countries such as Estonia, Finland, Germany, France, or Portugal.
- 2) Tourism is positioned within a collection of policy areas such as culture and business affairs in Iceland, regional development in the Czech Republic, or enterprise and innovation in Sweden.
- 3) Tourism has a separate ministry, reflecting the importance of the sector to the national economy, which is the case of Greece, Malta, and Italy.
- 4) Tourism is connected to relevant policies areas within the same ministry, such as transport in the Slovak Republic, trade and industry in Spain or sports in Croatia and Poland.

**There is not a single approach that is better than the others. The best model from an institutional perspective depends on a country's specific context, goals, and priorities, with each approach offering unique advantages.** Positioning tourism within an economic ministry ensures it is linked to economic growth and aligned with broader economic policies. Integrating tourism within or connecting it to a collection of policy areas enhances coordination and leverages synergies with sectors related to tourism development and management. Establishing a separate ministry for tourism highlights its significance and ensures dedicated focus and specialised strategies, though it does not necessarily mean more support and resources. However, this approach guarantees that tourism has equal status with other governmental ministries, a voice in all strategic decisions, integration into the overall country strategy, and representation in crisis management forums during crisis events.

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<sup>33</sup> OECD Tourism Trends and Policies 2022

The governance mechanisms (e.g., regulatory framework with clear roles and responsibilities for tourism organisations, tools, coordination structures, communication channels) are more important than the governance model. These mechanisms should ensure destination management organisations have clear mandates and broad responsibilities to effectively support the tourism ecosystem. These mechanisms should also enable effective horizontal, vertical, and sectoral coordination and facilitate clear communication and information sharing to enhance coordination and ensure alignment among the diverse set of stakeholders. All these topics are challenges that will be developed in the following paragraphs.

**At the national level**, the governance of national tourism policy is typically overseen by a National Tourism Authority (NTA), led by a government-appointed minister or secretary of state, vested with legislative or regulatory power. That office is supported by a delivery agency implementing government policy - a National Tourism Organisation (NTO). International marketing and promotion are frequently a key activity for NTOs, but the role can be wider (policy implementation, support tourism businesses). This wider role depends on factors that include the maturity of the tourism sector, the objectives of the underlying strategy, and the roles of other government bodies that influence the delivery of tourism policy.

**Regional and local tourism bodies** – mostly regional and local DMOs - are fundamental in tourism development and management as they often play both a strategic and operational role. They are tasked with (1) understanding the challenges of the tourism sector in their area and (2) developing plans to address these challenges and further develop tourism. Product development is usually a core responsibility, along with other operational tasks regarding local visitor information, research, and quality accreditation. They may also be involved in domestic promotion, while overseas and the country's promotion is usually the responsibility of NTOs.

These tourism management organisations can be grouped under three different types that can operate at the 3 different levels (national, regional, and local), considering their different roles, responsibilities and mandate.

- **Legislative & Regulatory** – as referred before, they are usually National Tourism Authorities (NTAs), although they can also be NTOs, and other public tourism entities (including regional and local) vested with legislative or regulatory power. They oversee the organisations responsible for policy implementation, marketing, and promotion, encompassing the entire spectrum of destination governance.
- **Promotional** – NTOs, DMOs, and other public tourism entities (including regional and local) which have a focus on Marketing & Promotion.

- Operational – National Tourism Organisations (NTOs), Destination Management Organisations (DMOs), and other public tourism entities (including regional and local) actively involved in policy implementation, collaborating closely to support businesses within the tourism ecosystem, and typically entrusted with promotional responsibilities.

As mentioned in the introductory paragraphs, effective destination tourism governance requires a clear structure with well-defined roles and responsibilities. It should feature robust tourism organisations positioned at national, regional, and local levels, each with broad responsibilities and an effective mandate to support the ecosystem in various areas. These areas include promotion, technical and financial support, education and training, and data collection and analysis. Clear and effective governance ensures that all stakeholders understand their roles and how to coordinate with others, creating a cohesive and efficient tourism ecosystem.

The work with tourism organisations from different geographies, different levels and with different mandates allowed for the identification of **key challenges** weakening the role of tourism management organisations and the governance of tourism destinations, while hindering the capacity to build better resilience (figure 18).



Figure 18. Summary of the key challenges

### Limited Mandate and Narrow Scope of Tourism Organisations

NTOs and DMOs often have limited mandates, restricting their ability to effectively support the tourism ecosystem. This comes as a result of their narrow scope of activities that hinders them from: 1) being involved in permanent collaboration with policy makers to develop better and targeted support for the tourism ecosystem; 2) being engaged with tourism stakeholders providing them

with the necessary technical support, education and training, while being the main source of information and support for tourism businesses and organisations; 3) being responsible for facilitating access and providing financial support to tourism businesses and organisations; 4) supplying tourism stakeholders with data and insights that helps them support decision-making, develop better strategies and navigate through crisis events.

This is more visible in organisations with a primary focus on promotion, as they often play a limited role in resilience building and crisis preparedness and management. However, their contributions should not be underestimated. These organisations hold market responsibility and can significantly support destinations and businesses through marketing and promotional efforts. They enhance the resilience of tourism destinations by diversifying source markets, promoting lesser-known products and areas to alleviate pressure on major attractions, and encouraging tourism during off-peak seasons. These organisations can also play an important role in crisis management by leading communication efforts, and in crisis recovery by developing promotional strategies targeted at increasing tourism confidence and promoting crisis management efforts.

### **Unclear Governance Structures & Unclear Roles and Responsibilities of Tourism Organisations in Crisis Management**

There is often lack of clarity and visibility regarding the roles and responsibilities of the different organisations within the tourism ecosystem, particularly when there are overlapping responsibilities among National Tourism Authorities (NTAs), National Tourism Organisations (NTOs), and regional and local entities. This ambiguity leads to overlapping responsibilities or grey areas where no single entity is clearly accountable. This is most evident in crisis management, as it is unclear who is responsible for what action at each level. While day-to-day operations may function smoothly despite these uncertainties, the absence of clearly defined roles becomes particularly problematic during crises. The situation worsens when multiple organisations at the same level are involved in managing tourism, leading to confusion and inefficiency.

**These challenges stem from inadequate stakeholder mapping and the absence of comprehensive Crisis Management Plans that would otherwise provide clear guidelines and governance structures.** Addressing these issues is crucial to enhancing coordination and preparedness within the tourism sector, ensuring a more effective response to future challenges and crises.

### **Fragmented Ecosystem & Coordination Challenges**

The tourism ecosystem is highly fragmented, encompassing both public and private sectors, various fields of activity, and a predominance of SMEs. This fragmentation makes governance and coordination exceptionally challenging, as the ecosystem comprises numerous actors with diverse and sometimes

conflicting interests. The vast array of entities that constitute a tourism destination, each with their own expectations, makes it difficult to harmonise these different perspectives and needs. That harmonisation is crucial, considering that “tourism” needs to have a coordinated approach, as it must coordinate with actors and organisations from other sectors and areas.

The situation is made even more difficult by factors such as time constraints, rapidly changing dynamics, limited resources, information overload, shifting priorities, and leadership challenges (factors that are even more critical in a crisis situation). Aligning the interests of the public and private sectors is particularly complex in such a fast-changing environment. Furthermore, misalignment between different levels of governance complicates matters even more. Ensuring that local efforts align with regional and national strategies is essential but often difficult.

The unclear governance structures of tourism destinations and unclear roles and responsibilities further increase coordination challenges between tourism stakeholders and with other sectors.

While there are some *ad hoc* coordination forums, there is a lack of formalised structures with clearly defined objectives, roles, and participation criteria, to ensure that all tourism sectors are heard and considered in the decision-making process and strategy development. Moreover, these forums are typically activated during crisis management but having them in place continuously would be beneficial for building resilience and improving crisis preparedness. These structures could be important for risk sensing and as an early warning mechanism to help foresee potential domino effects in the ecosystem.

These issues lead to several specific problems that hinder resilience building and crisis preparedness:

- **Lack of Strategic Alignment:** the fragmented ecosystem makes it difficult to align the interests of all stakeholders. Coordination challenges hinder strategic alignment at different levels and across various sectors, making it difficult for unified development in critical areas such as product development, source market segmentation and targeting, promotion & marketing and destination and crisis management, often resulting in fragmented and ineffective outcomes.
- **Inefficiencies and fragmented efforts across different levels and sectors:** this can aggravate the ambiguity in roles and responsibilities, leading to duplicated efforts and hindering effective decision-making and the implementation of initiatives.
- **Policy Development and Implementation & Targeted and Accessible Support:** the complex stakeholder landscape makes it difficult to develop policies that consider diverse interests. This also complicates the delivery

of targeted and accessible support, particularly for SMEs – businesses that are generally less resilient and lack the capacity and resources to develop crisis preparedness and to cope with the changes and costs that crises entail. Fragmented ecosystems and poor coordination further complicate feedback collection and policy adjustments during policy implementation. Misalignment between local, regional, and national strategies often results in ineffective policy implementation, with local initiatives sometimes undermined by broader policies.

- **Lack of a Unified Voice:** this means the lack of a unified voice advocating the ecosystem's interests. This weakens its influence in policy discussions and funding decisions and hinders the promotion of a consistent external image of the destination.
- **Poor Risk Sensing and Management:** ineffective coordination reduces the ability to detect and manage risks. This leads to inadequate early warning systems and poor preparedness for potential disruptions, leaving the tourism ecosystem more vulnerable.
- **Ineffective Crisis and Emergency Response:** Diverse interests and lack of coordination can slow down decision-making processes during crises, leading to delayed responses and exacerbated impacts. Diverging protocols and poor communication further complicate emergency responses, resulting in inadequate support for impacted tourists and slower recovery times.

It is essential, to address these issues, to foster collaboration, improve communication, and develop comprehensive plans that consider the diverse needs and roles of all actors within the tourism ecosystem.

### **Communication Challenges**

Clear communication channels and access to accurate information are critical needs for the tourism ecosystem to effectively respond and recover from future crisis events. In times of crisis, transparent communication ensures that relevant information reaches all stakeholders, including government authorities, tourism businesses, and tourists. It enables the dissemination of vital updates, safety protocols, and travel advisories, allowing businesses to adapt their operations and to make informed decisions.

Communication channels among tourism stakeholders are often poorly established, making it difficult to share and disseminate information vertically and horizontally. This lack of efficient communication hampers the ability to build a common vision, clarify roles and priorities, and ensure that all parties are on the same page.

Coordination and communication among stakeholders need substantial improvement to enhance tourism governance. Developing robust communication

strategies can help build a unified vision and understanding among various entities, from local municipalities to national authorities, public to private sector. Consistent and efficient communication is vital for articulating needs and expectations, particularly during a crisis when timely and accurate information is crucial for effective decision-making and response.

### **Changing Policy Priorities**

Changing policy priorities on tourism presents significant challenges to the improvement of tourism governance. These dynamics hinder long-term planning and the implementation of strategic initiatives essential for strengthening tourism governance. Moreover, it makes it difficult to maintain continuity and coherence in policies and initiatives, leading to fragmentation in policy objectives and strategies across local, regional, and national levels.

### **Bureaucracy and Institutional Inertia**

A significant challenge for effective tourism governance is the lack of agility within governance structures, something widely referred to by tourism destinations and sectors. The slow and rigid nature of bureaucratic processes (e.g., the slow approval processes for funding or the complex procedures for mobilising resources) caused by many organisational layers and complex decision-making flows, often hinders the ability to respond swiftly to emerging issues and crises. This lack of agility impedes timely decision-making and the implementation of any necessary action, which is especially problematic in the fast-paced and dynamic context of the tourism industry. This bureaucratic inertia is a barrier to effective governance, limiting the ecosystem's ability to be proactive and responsive.

The annex ([Key challenges and barriers recognised for different governance models](#)) has a summary table of the main challenges and key barriers, considering the different actors of the tourism ecosystem (not exhaustive).

## 6. Key barriers to improving crisis management capacity

The **key barriers** that are hindering the ability of tourism destinations and sectors to develop better crisis preparedness and management capacity are identified in figure 19 below.



Figure 19. Summary of the key barriers

### Absence of Strategic Alignment

There is often an **absence of strategic alignment** between tourism strategies and overall national, regional, and local strategies. Tourism planning, including crisis management, is **not well-integrated into broader planning efforts across various levels**. This results in the insufficient structural integration of crisis management within tourism-related institutions, creating a fragmented approach that prevents effective crisis preparedness and response. This issue extends beyond vertical alignment with different levels of governance, including



horizontal alignment with different areas of government and various public policies.

## Policy & Regulation

**Policies and regulations are not always adequately tailored to support tourism development and resilience building.** Service beneficiaries mentioned some critical areas where inadequate policy or policy gaps hinder progress. Infrastructure development that aligns with tourism development, such as mobility or transportation networks, often do not receive sufficient prioritisation, limiting destination accessibility and growth. Taxation policy, including high VAT rates and inconsistent tax incentives, reduce competitiveness. Labour regulations, often fail to accommodate seasonal demand, leading to workforce shortages during peak periods.

Moreover, strategic frameworks to manage demand and mitigate environmental impacts are often lacking, as are measures to adapt to climate change. Rapid technological advancements require supporting policies for adopting new technologies, and investments in data collection and analysis tools are crucial for managing tourism growth and to develop crisis preparedness. Additionally, the sector needs policies to attract, retain, and develop a skilled workforce.

Finally, overregulation and inefficient public sector support to the private sector undermine confidence and the willingness to collaborate. The private sector often views the public sector as bureaucratic, slow, and inefficient in addressing urgent issues. This highlights the need for a better relationship and for the private sector's voice to be heard in policy development and adjustments to enhance crisis management.

## Crisis Management is not a priority area

**Adequate resource allocation and funding are critical for the tourism ecosystem to build resilience, develop preparedness for crisis events, and effectively manage and recover during such events.** It requires sufficient financial resources to invest in proactive measures that enhance the ecosystem's ability to withstand and adapt to crises. It also requires adequate funding during crises to enable the deployment of timely response measures, such as emergency support for affected businesses and destinations, communication campaigns to rebuild trust, and targeted recovery initiatives.

Overall, tourism organisations, both public and private, **lack the necessary financial resources to develop crisis management preparedness.** These organisations have limited resources, which they end up prioritising to areas that need urgent attention or to the areas mostly related to their mandate and operation, such as promotion or product development. This is most noticeable in public organisations at the regional and local levels – regional tourism authorities and regional and local DMOs. The private sector, composed by a vast majority of SMEs also faces this barrier, as these organisations are not

only constrained by financial resources but also by manpower, time, and tools. These businesses are generally less resilient and lack the capacity and resources to cope with the changes and costs that such shocks entail. This is a result of the lack of targeted support to SMEs, including the necessary tools, frameworks, and financial resources for these smaller organisations to develop their resilience.

### **Lack of common risk assessment frameworks and crisis response mechanisms**

The tourism ecosystem **lacks robust risk assessment frameworks**, even though the importance of developing crisis management plans and response strategies is increasingly recognised. These frameworks enable stakeholders to identify potential risks, evaluate their potential impact, and devise effective strategies to mitigate their effects. They also allow for comparability, which contributes to collaborative learning.

Furthermore, the ecosystem **lacks specific/targeted crisis response mechanisms** to minimise the disruption caused by crisis events and to facilitate recovery. The tourism ecosystem, by having pre-defined policies and measures, well-defined protocols, coordinated communication channels, and efficient resource allocation mechanisms in place, can promptly respond to crises, protect the well-being of stakeholders, and accelerate the restoration of operations.

### **Labour Shortages**

The tourism ecosystem is experiencing **significant labour shortages, which limit resilience building and crisis preparedness**. Essential tasks such as conducting regular risk assessments and monitoring, developing crisis management plans and emergency protocols, and establishing necessary coordination mechanisms, are frequently neglected. Current workforces are often overwhelmed by daily operations, leaving them with insufficient time to focus on building resilience.

### **Lack of Expertise in Crisis Management**

The tourism ecosystem is experiencing significant **lack of expertise and training** in resilience and crisis management, particularly within smaller local and regional DMOs, as well as tourism SMEs. This gap further weakens the sector's ability to prepare for and respond to crises effectively.

### **Lack of access to timely and granular data**

The availability and quality of data are critical for resilience building and crisis preparedness, response, and recovery. However, many destinations (mostly at regional and local levels) and businesses **lack access to updated and reliable data**.

Public (and free) information from, for example, official statistical offices is very delayed in time and not updated with the necessary frequency and granularity. This gap limits destinations' ability to make timely decisions on measures to support the ecosystem or evaluate the effectiveness of those measures already implemented.

Moreover, they lack forward-looking indicators, which are essential to predict sufficiently in advance and monitor the impacts of a crisis event (e.g., severity and length) and to stimulate the recovery and re-start of tourism.

Some tourism sectors, such as, for example, the cruise ship sector and exhibitions are not targeted in official statistics, so publicly available relevant data in those areas is lacking.

Regional and local tourism organisations and SMEs are the organisations most limited in terms of access to data sources and tools, hindering informed decision-making and effective crisis preparedness and management. Paid private sources, which can provide this required periodicity and granularity, are expensive and not affordable for many tourism organisations.

### **Lack of advanced data collection and analysis systems and open data platforms**

The ecosystem, particularly at regional and local levels and SMEs, lacks advanced data collection and analysis systems to fully leverage the potential of data (and big data). Such systems are essential to aggregate data from different sources, perform comprehensive analyses, and correlate different indicators. Furthermore, there is a lack of incorporation of new technologies, such as AI, which could significantly enhance decision-making processes and the development of predictive models. These models would be crucial for effective crisis preparedness and management, offering insights that enable proactive measures and swift responses.

Moreover, there is a notable absence of user-friendly open data platforms that facilitate the integrated use of data across the ecosystem. These platforms, to be developed and managed by NTOs, would be important to disseminate key indicators and insights, empowering stakeholders with fewer resources to make informed decisions. Such platforms, by improving data accessibility and usability, could greatly enhance destination management and business operations, including in times of crisis.

### **Lack of skills and awareness to make use of data for decision-making and crisis preparedness**

There is a significant lack of skills and awareness among stakeholders in the tourism ecosystem regarding the use of data for decision-making and crisis preparedness. Many are unaware of existing data sources and indicators to monitor — both public and private — and the tools and systems needed to collect

and analyse data effectively. Furthermore, there is lack of knowledge about how to interpret data insights to support informed decision-making processes. This knowledge gap hinders stakeholders from fully leveraging data-driven approaches to enhance resilience building, crisis management and to monitor the tourism activity.

### **Ongoing Recovery from Recent Crises**

The tourism ecosystem is **still recovering from recent crises**, such as the COVID-19 pandemic, geopolitical situation in Ukraine or the energy crises. This has put extra pressure on organisations and businesses, which have no capacity or resources to develop strategic planning and build resilience and prepare for crisis management.

This is expected to become an ongoing challenge for destinations and businesses as the potential effects of crisis events in tourism are likely to increase in both size and frequency, making it difficult for them to fully recover before having to face new challenges. Therefore, it is crucial to build a resilient tourism ecosystem that can handle consecutive crises without having the opportunity to fully recover in between.

## 7. Key drivers and enablers for improving crisis management capacity and resilience

This chapter describes the **key drivers and enablers** strengthening the role of tourism management organisations and enhancing the governance of tourism destinations, thereby improving their capacity to build resilience and have better crisis management capacities (figure 20).

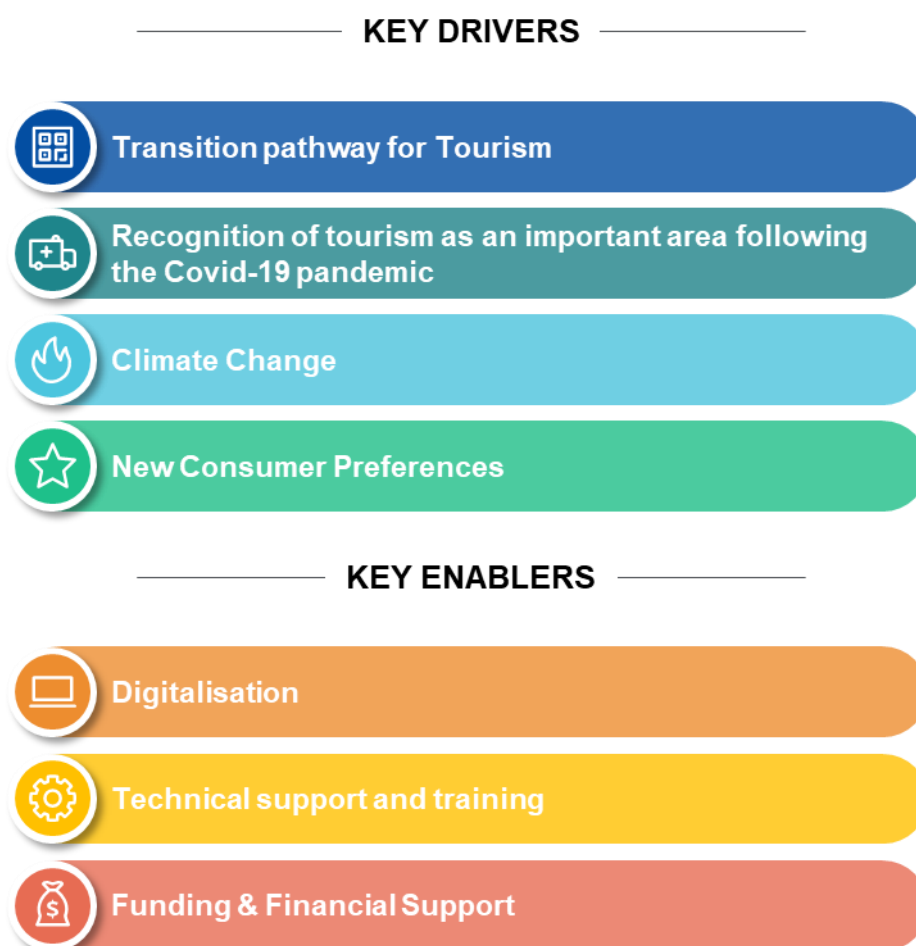


Figure 20. Summary of the key drivers and key enablers

### Key Drivers

#### Transition Pathway for Tourism

The co-creation process of the EU Tourism Platform successfully identified key areas for action and defined relevant objectives to inspire different groups of stakeholders to take action. Moreover, as per the Tourism Transition Pathway (TTP) “Taking stock of progress 2023” report<sup>34</sup>, it has proven to be successful in supporting the collective work towards achieving the transition of the EU tourism ecosystem and building its resilience. It has done this by guiding Member States’

<sup>34</sup> [Transition pathway for tourism - Publications Office of the EU \(europa.eu\)](https://european-council.europa.eu/media/en/press-communications/inline-photos/2023/07/10/P13223_en.pdf)

policies and by inviting and sharing specific examples for stakeholders, including destination management organisations, to act to improve their governance models, strategies, and achieve resilient tourism management. There were 529 published pledges by July 2024, covering all topics identified in the transition pathway. Published commitments to support the pathway's objectives were collected from 241 organisations across 36 EU and non-EU countries.

### **Recognition of tourism as an important area following the COVID-19 pandemic**

The COVID-19 pandemic highlighted (amongst governments and policy makers) the importance of tourism in critical areas such as economic growth, job creation, and cultural exchange. The growing acknowledgment of **tourism's role as a vital catalyst for social and economic development** has been essential for driving its inclusion in long-term overarching strategic planning and resilience building. Consequently, tourism is now represented in national and European strategy and crisis management forums, highlighting its importance in these discussions.

### **Climate Change**

Climate change is contributing to the degradation of destinations' environmental resources that are critical attractions for tourism, such as snow conditions, wildlife productivity and biodiversity. This has driven tourism organisations to take action to improve resilience and sustainability (e.g., developing environmentally friendly tourism products, implementing initiatives to reduce seasonality, or increasing length of stay). It has also meant organisations develop better preparedness for the more frequent and severe climate-related and natural crisis events.

### **New Consumer Preferences**

Emerging **new consumer preferences** for sustainability, slow tourism, rural experiences, and authenticity are a driving force for resilience building in the tourism sector. It is driving the development of tourism models that decrease vulnerabilities to crises. These new models reduce, for example, the pressure on major destinations, mitigating seasonality and contributing to the preservation of natural, cultural, and historical assets.

## Key Enablers

### Digitalisation

The increased digitalisation of the sector, new tools and big data are playing a pivotal role in enhancing crisis management capacity within the tourism sector. Leveraging big data and advanced technology enables **better risk sensing and data-driven decision-making**. Digital tools facilitate effective communication, enabling agile operations and supporting collaboration among stakeholders. Furthermore, digital platforms enhance destination management by providing real-time insights and improving the ability to respond to crises promptly and efficiently.

### Technical support and training

The **availability of specialised technical assistance** from organisations and networks (e.g., EEN) through EU and national programmes (e.g., Digital Academy and BEST programme, of Turismo de Portugal) provides increased awareness and enhances crisis management skills. Learning from best practices and real-life experiences of other destinations is helping to make crisis management frameworks more robust. Twinning and collaborative approaches are increasingly becoming common frameworks that enable destinations to work together on shared challenges and initiatives, promoting joint resilience-building efforts and preparedness strategies.

### Funding & Financial Support

Available and anticipated **funding** opportunities, such as the Recovery and Resilience Facility (RRF), National and Regional Strategic Reference Frameworks (2021-2027), and Interreg, can provide important **financial support** to develop activities to build resilience and enhance crisis management preparedness. These funds can support programs such as the Portuguese “*ATT – Acelerar e Transformar o Turismo*,” which is enabling DMOs, tourism companies, tech companies and universities to develop projects that contribute to improve tourists’ experiences and destination management. These projects are increasing the resilience of the ecosystem with the development of new and diversified tourism offers, improved data collection and analysis mechanisms, training programmes to build the capacity of tourism professionals and technological solutions that are bringing efficiency and reducing the impact of tourism.

According to the TTP report “Taking stock of progress by 2023” under the RRF, the estimated investment in the tourism ecosystem is EUR 11.35 billion, by 15 Member States. Moreover, in the 2021-2027 period, Member States and regions have allocated EUR 4.2 billion to sustainable tourism support under programmes funded by the European Regional Development Fund (ERDF), including its European Territorial Cooperation strand (Interreg).

## 8. Initiatives to increase the resilience and crisis preparedness of destinations

The activities included in selected service beneficiaries' actions plans were collected and analysed, considering that one of the main objectives of the project was to provide a support service for the development of action plans to improve their resilience and preparedness to manage and mitigate crisis events.

The activities most indicated by the service beneficiaries provide critical insights into the current priorities of organisations in the tourism ecosystem (figure 21). **Those activities most mentioned include training & capacity building, development of crisis management plans and crisis communication strategies.** This is in harmony with the low maturity level of many service beneficiaries. It also highlights the need to take initial steps towards developing comprehensive crisis preparedness. Despite having experienced crises, many organisations still lack documented plans and procedures to effectively manage such events.

**Governance emerges as a key area of concern. There is the pressing need for destinations and organisations to strengthen their governance structures. This involves clearly defining roles & responsibilities in crisis management. Collaboration at different levels and with a broad set of stakeholders within and outside the tourism ecosystem also needs to be enhanced.**

Additionally, **data collection, analysis mechanisms and risk assessment** are also critical. They serve as crisis early warning mechanisms and to provide information for decision-making, crucial in resilience building and ensuring the sustainability of the sector.



Figure 21. Overview of the most referred activities



Most of the mentioned activities refer to mechanisms to prepare, respond and recover from crisis events, followed by action to strengthen governance and coordination and finally to facilitate data accessibility (figure 22).



Figure 22. Overview of the percentage of activities mentioned under each focus area

The objectives and examples of the activities most mentioned by tourism destinations and sectors to 1) strengthen governance and coordination, 2) build resilience and improve crisis preparedness and 3) to facilitate data deployment, are summarised below.

### 1. Strengthen Governance and Coordination

Strengthen Governance and Coordination	
<b>Coordination &amp; Collaboration</b>	<p><i>Stakeholder Mapping</i></p> <ul style="list-style-type: none"> <li>Identify relevant stakeholders to coordinate within and outside the tourism ecosystem.</li> <li>Map out the relationships between these stakeholders to better understand the influence and interest each one has in the tourism sector and how they can contribute to improved resilience and crisis management.</li> </ul>
	<p><i>Improvement of Coordination Structures</i></p> <ul style="list-style-type: none"> <li>Create dedicated working groups focused on resilience, crisis preparedness and crisis management. These groups should include representatives from various stakeholder categories, ensuring a wide range of perspectives and expertise.</li> </ul>
	<p><i>Enhancing Collaboration and Networking</i></p> <ul style="list-style-type: none"> <li>Organise regular forums and networking events to foster collaboration among public and private entities, NGOs, and local communities.</li> <li>Establish formal and informal communication channels such as mailing lists, social media groups, and collaboration tools.</li> <li>Schedule regular meetings, webinars, and conferences to discuss crisis management topics, share updates, and address challenges.</li> <li>Engage in joint projects with other regions/countries and with organisations outside the tourism ecosystem</li> </ul>

<b>Strengthen Governance and Coordination</b>	
	<p><i>Promoting Best Practices Sharing</i></p> <ul style="list-style-type: none"> <li>• Share and collect best practices, measures, policies, and initiatives developed by similar destinations/organisations to leverage expertise and innovative solutions.</li> <li>• Organise workshops and meetings focused on exchanging successful strategies and lessons learned from past experiences.</li> <li>• Give incentives, such as recognition programs or financial support for innovative initiatives to motivate stakeholders to adopt and implement best practices.</li> </ul>
<b>Governance Structure Strengthening</b>	<p><i>Roles and Responsibilities Definition</i></p> <ul style="list-style-type: none"> <li>• Define the roles and responsibilities of different tourism organisations in resilience building, crisis preparedness and management within the destination.</li> </ul> <p><i>Strengthening the Mandate of Organisations</i></p> <ul style="list-style-type: none"> <li>• Review the regulatory framework to strengthen the role of tourism organisations, increasing their mandate to effectively support the ecosystem by strengthening their administrative autonomy and including activities such as training, and technical and financial support.</li> <li>• Provide legal and regulatory backing to their initiatives, secure adequate funding, and ensure the necessary resources and tools.</li> <li>• Develop internal procedures and provide training to staff so that they are better equipped to deal with crisis situations.</li> </ul> <p><i>Review Destinations' Management Models</i></p> <ul style="list-style-type: none"> <li>• Conduct a study to identify areas for tourism governance improvement, namely in the coordination between different levels of government (horizontal and vertical coordination) and across various sectors (sectoral coordination).</li> <li>• Evaluate the effectiveness of existing structures, policies, and practices.</li> <li>• Create a more adaptable and robust system to handle crises effectively.</li> <li>• Strategically plan the long-term financing for tourism.</li> </ul> <p><i>Create Structures Focused on Crisis Management</i></p> <ul style="list-style-type: none"> <li>• Create a crisis steering group involving relevant stakeholders, responsible for overseeing crisis management activities and strategies.</li> <li>• Train internal structures for crises situations and perform drills to foster cross-department collaboration.</li> </ul>

These activities developed by service beneficiaries collectively aim to address the challenges and barriers mentioned and which are identified within their destination/organisation. By improving coordination and collaboration within the ecosystem and strengthening governance structures, service beneficiaries aim to enhance their overall coordination, clarify unclear roles and responsibilities in crisis management, and create more robust governance frameworks.

## 2. Build Resilience and Improve Crisis Preparedness

<b>Build Resilience and Improve Crisis Preparedness</b>	
<b>Development of Crisis Management Plans</b>	<ul style="list-style-type: none"> <li>• Conduct a thorough review of existing crisis management plans to identify gaps and areas for improvement.</li> <li>• Draft and implement the new and improved crisis management plans, considering:                             <ul style="list-style-type: none"> <li>• Best practices and lessons learned from past crises.</li> <li>• Specific plans for the different types of crises that can affect destinations (e.g., plan for wildfires, for an epidemic, for a terrorist attacks, etc.).</li> <li>• Crisis emergency protocols to be activated when a crisis hits.</li> </ul> </li> <li>• Establish a schedule for regular updates and revisions to keep the plans current and relevant.</li> </ul>
<b>Crisis Communication Strategy</b>	<ul style="list-style-type: none"> <li>• Develop a comprehensive communication strategy that encompasses all aspects of crisis communication.</li> <li>• Develop a detailed crisis communication management plan that outlines roles, responsibilities, and procedures for communication during a crisis.</li> <li>• Establish multiple communication channels (e.g., social media, local media, hotlines, etc.) to reach different audiences.</li> </ul>
<b>Secure Funding</b>	<ul style="list-style-type: none"> <li>• Diversify revenue streams to secure financial sustainability.</li> <li>• Create a funding strategy that includes multiple sources such as grants, loans, and subsidies. Maximise the use of available EU funding opportunities by actively seeking and applying for relevant funding calls.</li> </ul>
<b>Training and Capacity Building</b>	<ul style="list-style-type: none"> <li>• Create comprehensive training programmes tailored to crisis management and response.</li> <li>• Organise and promote training exercises, drill, and simulations to prepare for different crisis scenarios.</li> <li>• Incorporate crisis management education into tourism courses at schools and universities as an optional subject.</li> </ul>
<b>Diversify Source Markets &amp; Product Development</b>	<ul style="list-style-type: none"> <li>• Develop strategies to reduce dependence on top source markets and increase tourism resilience.</li> <li>• Innovate and develop new tourism products to attract a broader range of visitors in terms of origins, age groups, interests, etc.</li> <li>• Enhance tourism offerings to cater to new trends such as sustainability, slow tourism, rurality, and authenticity, reduce seasonality, and distribute tourism fluxes more evenly throughout the territory and the year:                             <ul style="list-style-type: none"> <li>• Preserve natural, cultural, and historical assets.</li> <li>• Promote new tourism offers. Develop sustainable and authentic tourism products and services.</li> <li>• Work with tourism stakeholders and communities to develop new tourism offers outside the main tourist areas. Work with municipalities and communities to develop a year-round calendar of events and activities.</li> <li>• Develop an accessible and inclusive tourism offer to cater to a broader target base.</li> </ul> </li> </ul>

<b>Build Resilience and Improve Crisis Preparedness</b>	
<b>Marketing &amp; Promotion</b>	<ul style="list-style-type: none"> <li>• Develop marketing strategies to boost tourism at local, regional, and national levels.</li> <li>• Substantially invest in destination branding to enhance the destination's image and attractiveness.</li> </ul>
<b>Infrastructure development</b>	<ul style="list-style-type: none"> <li>• Develop and upgrade infrastructure to improve destinations' accessibility and connectivity.</li> <li>• Build infrastructure that is resilient to future crises, such as facilities that can withstand storms, wildfires, and other extreme events.</li> </ul>
<b>Staff Attraction and Retention</b>	<ul style="list-style-type: none"> <li>• Develop strategies for attracting skilled professionals to the tourism sector.</li> <li>• Invest in professional development programmes to enhance the skills and knowledge of existing staff.</li> <li>• Implement strategies to retain talent, such as competitive compensation, career growth opportunities, and a positive working environment.</li> </ul>
<b>Strategic Planning</b>	<ul style="list-style-type: none"> <li>• Develop comprehensive strategies to improve overall destination management, focusing on sustainability (mostly environmental, but also economic, and social), resilience, and competitiveness.</li> <li>• Incorporate sustainable practices, such as climate protection measures, energy and resource conservation and climate adaptation, into all aspects of tourism management to enhance the ecosystem's resilience.</li> </ul>

This action by service beneficiaries aims to complement their governance structures with better mechanisms to build resilience and crisis management preparedness. The goals of these activities are to significantly enhance crisis management efforts and mitigate the challenges and barriers identified, such as labour shortages, lack of strategic planning and fragmentation of the ecosystem, and lack of expertise and resources.

### 3. Facilitate Data Deployment

Facilitate Data Deployment	
<b>Data Collection and Analysis &amp; Digitalisation</b>	<p><i>Data Platforms and Dashboards</i></p> <ul style="list-style-type: none"> <li>• Create a centralised tourism data platform that aggregates real-time data from various sources such as visitor surveys, social media, booking platforms, local businesses, and government agencies. This platform can be used as an early warning system providing alerts about the variation of certain indicators and providing comprehensive insights to support decision-making and crisis management.</li> <li>• Use collected data to develop predictive models that can forecast potential crises and their impacts.</li> <li>• Adopt new digital tools, including an AI copilot to support data analysis and provide insights to support decision-making.</li> <li>• Create information hubs where best practices and data insights can be shared among stakeholders.</li> <li>• Conduct regular industry sentiment analyses to gauge its confidence and identify areas of concern.</li> <li>• Build data collection and analysis capacity by training workers of the destinations.</li> </ul>
<b>Digitalisation</b>	<ul style="list-style-type: none"> <li>• Create and implement digital tools that aid in crisis management, such as mobile apps, online portals, and digital communication platforms.</li> <li>• Implement a system to support various aspects of crisis management, from real-time communication to resource allocation and monitoring.</li> </ul>
<b>Risk Identification and Assessment</b>	<ul style="list-style-type: none"> <li>• Conduct regular risk assessment and monitoring.</li> <li>• Identify potential crisis scenarios, such as natural disasters, political unrest, health emergencies, terrorism, cyberattacks or economic downturns.</li> <li>• (Regularly) assess tourism trends and challenges that might impact the EU tourism ecosystem</li> </ul>

As mentioned before, these actions collectively aim to address the challenges and barriers mentioned by service beneficiaries. The objective of service beneficiaries' facilitating data accessibility and leveraging digital tools and technologies is to significantly enhance their risk assessment skills and data management capabilities and make timely and informed decisions. This is crucial in all stages of a crisis: prepare, respond, and recover.

The analysis also covered the types of action that service beneficiaries included in their action plans, considering their:

Level



**Figure 23. Overview of the top activities mentioned by destinations according to their level**

Training and capacity building emerged as top priority across all organisational levels, with a particular emphasis on the local level due to its generally lower expertise and preparedness for handling crisis events (figure 23).

Communication strategies are crucial, and particularly relevant at the local level, where the organisations are in very close contact with tourists and residents. Developing robust communication plans and mechanisms tailored to local needs can significantly enhance the response to crises, ensuring that all stakeholders are well-informed and coordinated.

National organisations play a pivotal role in data collection and analysis, as they are typically better equipped with the resources needed to set up comprehensive data collection and analysis mechanisms. Centralising these efforts at the national level makes sense because it ensures consistency, accuracy, and efficiency in gathering and interpreting data. National organisations can develop sophisticated tools and methodologies by leveraging their resources, which might be beyond the reach of smaller, regional, or local entities.

The data collected at national level can then be disseminated to regional and local levels, which are also important beneficiaries of these mechanisms. This structure allows regional and local authorities to gain valuable insights and see trends that are crucial for their specific context. Their focus should be on risk

identification and assessment of risks tailored to their unique circumstances, which often differ from broader national concerns. This approach not only enhances the overall knowledge base but also empowers local authorities to make informed, context-specific decisions.

Lastly, improving the tourism offer is essential, with regional Destination Management Organisations (DMOs) playing a pivotal role. These entities are typically more involved in product development, making them well-positioned to enhance and diversify the tourism experiences available, thereby increasing resilience and the attractiveness of the destinations they manage.

**Mandate**



**Figure 24. Overview of the top activities mentioned by destinations according to their mandate**

Training and capacity building emerge as the action most referred by the different types of organisations, except for industry associations (figure 24). For them, data collection is a top priority. These associations must establish their own data collection and analysis mechanisms due to the inadequacies of public statistics, which often lack timeliness and the necessary granularity. This is especially critical for sectors like the exhibitions industry, which currently lacks official statistics. Industry associations, by setting up their own systems, can better

support their members with relevant and timely data, particularly small and medium-sized enterprises (SMEs).

The development of crisis management plans and crisis communication is also important for organisations with operational and marketing mandates, who have the responsibility to spearhead crisis management efforts when a crisis hits.

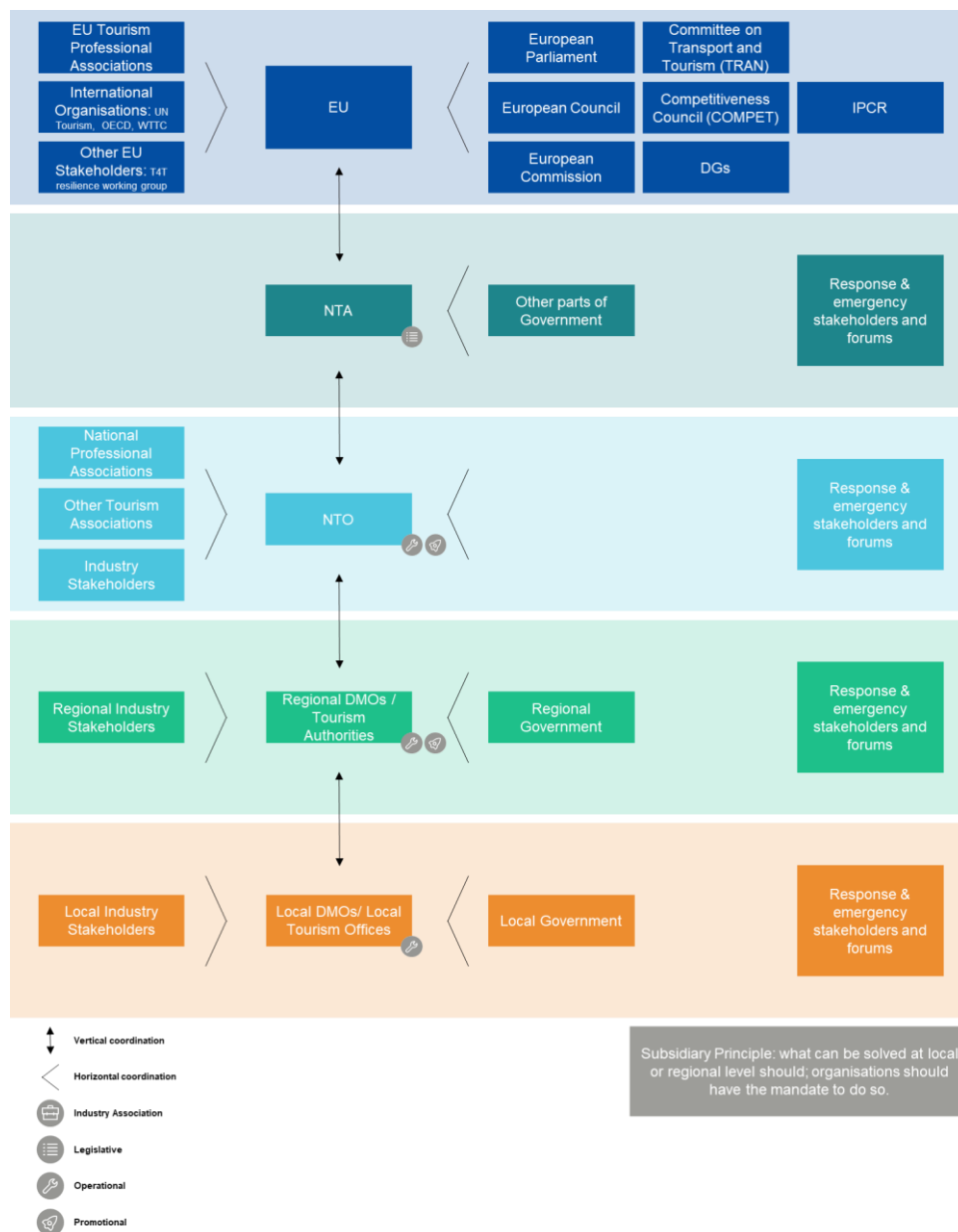
Strengthening governance is another crucial area. It is more notable in organisations with legislative power since they are concerned with creating a strong and clear governance structure with clear roles and responsibilities and enhanced coordination, to effectively build resilience and navigate crises.



## 9. Tourism ecosystem governance improvement and crisis preparedness

### 9.1. Tourism ecosystem governance improvement

The analysis, situational assessment, identified challenges, barriers, and opportunities facing tourism destinations, along with the developed action plans, led to several recommendations. These recommendations include suggestions for an organisational structure for the tourism ecosystem and ways to improve the allocation of roles and responsibilities, as well as vertical and horizontal interactions and collaborations (figure 25).



**Figure 25. Overview of proposed tourism governance and the roles and responsibilities of tourism organisations**

**Tourism is a fragmented ecosystem**, as described above. It is composed of different tourism ecosystem actors – which can vary from SMEs to multinational companies – and with various EU bodies and agencies having responsibilities and interests over tourism (e.g., DG REGIO – Funding tourism development; DG MARE – coastal tourism; DG AGRI – agro-tourism). Moreover, the 27 Member States may have very different approaches to dealing with crisis events. This diversity of stakeholders can make it challenging to develop a coordinated approach to crisis management. It also poses difficulties in establishing a coordinated tourism voice within various crisis management structures and bodies. For this reason, it is **crucial to improve horizontal, vertical, and sectorial coordination at EU level**, to guarantee a coordinated approach to resilience building and crisis preparedness and management.

**DG GROW** – the Commission service responsible for tourism policy – has a **central role in supporting the resilience and preparedness of the tourism ecosystem** for future crisis events. It does this by: 1) supporting the competitiveness, growth and resilience of the EU's tourism ecosystem; 2) implementing policies that sustain entrepreneurship and growth, including facilitating the access of EU tourism companies to funding and global markets; 3) leading efforts on digitalisation and decarbonisation of the European industry and SMEs, contributing to the objective of having a greener, more digital and more resilient EU economy; 4) managing the implementation of the Single Market Programme (EUR 4.2 billion from 2021 to 2027), which aims to strengthen the governance of the Single Market.

To **coordinate crisis management efforts**, if needed, the Together for EU Tourism (T4T) resilience working group could be established as the EU-level tourism crisis management group.

The **distribution of responsibilities of developing, promoting, and regulating tourism varies across EU countries**. It depends on factors such as the system of government, the importance of tourism in the economy or the nature of tourism demand. **There is not a single approach that is better than the others**. The best model from an institutional perspective depends on a country's specific context, goals, and priorities, with each approach offering unique advantages.

What truly makes the difference and can help to address the challenges previously identified:

1. **Robust tourism management organisations positioned at national, regional, and local levels** – such as NTOs and DMOs – that have broad responsibilities and an effective mandate to support the ecosystem. This support can be in various areas, including promotion, technical and financial support, education and training, and data collection and analysis.

2. **Clear roles and responsibilities.** Each entity should understand its limits and know which organisations, at different levels and of different sectors, they have to coordinate with for resilience building, crisis preparedness and management.
3. **Effective coordination** with (and within) the public, private and third sector, encompassing vertical, horizontal, and sectorial coordination.
4. **Clear communication channels** for information sharing to further enhance coordination and ensure alignment amongst the diverse set of stakeholders.

Other factors identified as contributing to improved governance include reduced hierarchies, flexible and agile structures that enable quick decision-making.

### **Key elements at national level**

At the national level, the governance of national tourism policy is typically overseen by a National Tourism Authority (NTA), led by a government-appointed minister or secretary of state, vested with legislative or regulatory power (in countries where there is regional autonomy, this role may be taken by the Regional Tourism Authority). This organisation should have the following responsibilities:

- **Policy Development:** formulating national tourism policies and strategies to promote tourism development in coordination with the National Tourism Organisation (NTO).
- **Regulation and Legislation:** Developing and implementing regulations and legislation pertaining to the tourism industry, including standards for accommodation, transportation, and attractions.
- **Financial Resources:** Defining and allocating financial resources for tourism development and to support initiatives of tourism ecosystems' businesses.
- **Infrastructure Development:** Coordinating efforts to enhance tourism infrastructure such as transportation networks, accommodation facilities, and recreational amenities.
- **Collaboration at Government Level and with EU Institutions:** Collaborating with other government departments and agencies to ensure that other parts of the government, with either an interest in or influence on tourism, can be fully involved in its planning and development. Also, to collaborate vertically both with EU institutions and with the regional and local authorities.

These organisations should play a crucial **role in crisis management** by wielding the authority to develop policies, regulations, and tailored measures to bolster destination management and support stakeholders within the tourism ecosystem. This will enhance resilience, preparedness, and facilitate recovery from crisis events.

In countries with regional autonomy (or without a NTA), this role should be taken on by a Regional Tourism Authority (e.g. a Federal Minister).

**National Tourism Organisations – NTOs** – should be the operational arm of NTAs, playing a crucial role in shaping and enhancing the country's tourism sectors. They can hold a critical position by serving as a bridge between tourism businesses and policy makers. This proximity to tourism businesses allows NTOs to develop deep understanding of the industry's needs, challenges, and opportunities, placing them in a privileged position to 1) help policy makers to shape better policies/initiatives and 2) support the successful implementation.

As previously mentioned, European destinations have National Tourism Organisations (NTOs) with a variety of mandates and responsibilities. Some NTOs focus solely on marketing and international promotion, while others have broader operational mandates that include areas such as education, training, and managing funding. **The analysis suggests that NTOs with a wide range of responsibilities, encompassing both operational and promotional roles, are better positioned to support the tourism ecosystem effectively.**

NTOs with broad responsibilities tend to be more agile and efficient, as they can manage a wide array of resources and streamline coordination efforts. This holistic approach allows them to develop and implement long-term strategies more effectively, covering the entire spectrum of destination management. It also eases coordination with only one contact point for operational and promotional tourism development.

The main responsibilities held by **NTOs should include:**

- **Engagement in policy development:** increasing their collaboration with policy makers (NTAs) to ensure that the interests of the tourism ecosystem are well-represented and aligned with broader national goals. This involves 1) constant monitoring of the results of the implementation of policy and 2) constant contact with the industry - to collect feedback and suggest improvements to policy makers.
- **Destination Management & Product Development:** overseeing 1) coordination across different bodies and ensuring synergy in implementing tourism policies; 2) the management and development of tourist destinations, including conservation of natural and cultural heritage sites; 3) product development and tourism offers.

- **Financial Support:** managing financial support instruments. Implementing and monitoring funding for regional and local tourism organisations and for companies within the tourism ecosystem. NTOs, by actively participating in the funding process, can play a crucial role in ensuring that the financial resources are distributed efficiently and effectively to support the growth and development of tourism destinations and businesses. They should also support the ecosystem by seeking out and applying for other funding opportunities (e.g., EU funding opportunities).
- **Training and Education:** Provide support for training programmes and educational initiatives aimed at improving the skills and knowledge of tourism professionals. Manage tourism education (vocational schools and higher education).
- **Technical Support:** Collaborate and support the tourism ecosystem to enhance the tourism product and experience, to build capacities in important areas of destination and tourism management, and support businesses to achieve common goals and address challenges.
- **Market Research:** Conduct market research to identify target markets, consumer preferences, and emerging trends in key source markets.
- **Market Intelligence:** Monitor and analyse global tourism trends, competitor destinations, and consumer behaviour to provide information to marketing and promotional strategies.
- **International Marketing:** Promote the country as a tourist destination through international marketing campaigns, trade shows, and promotional activities.

National Tourism Organizations (NTOs) should be **pivotal actors not only in responding to crises within the tourism sector but also in preparing for them**. This shall fortify the industry's resilience against potential disruptions: **they should have the formal role of resilience coordinators within the destination geography**. NTOs can play a crucial role in the preparation stage, by **implementing proactive measures aimed at enhancing the sector's readiness for unforeseen challenges**. They can engage in scenario planning exercises, risk assessments, and capacity-building initiatives to equip tourism organisations, businesses and stakeholders with the necessary tools and knowledge to anticipate and mitigate potential crises.

NTOs should therefore be supplied with the capacity (by NTAs) with the necessary support and resources (human, financial and technology) to be able to coordinate resilience building, crisis preparedness and management within the destination tourism ecosystem. They should create specific teams to spearhead and manage their efforts, such as:

- **Tourism crisis management committee**, which defines, manages, and monitors resilience building and crisis preparedness activities, including the development and update of the destination crisis management plan. This committee should establish and coordinate necessary collaboration structures with tourism organisations at different levels, relevant governmental agencies, industry associations and other relevant stakeholders to establish robust crisis management frameworks and protocols. They can ensure resilience building and crisis preparedness and that information flows efficiently by fostering partnerships and knowledge-sharing networks, enabling timely decision-making, and coordinated responses in times of crisis.
- **Risk assessment & monitoring team**, which can be integrated into the market intelligence team, will establish early warning mechanisms, and perform risk sensing, monitor, and analyse data to provide insights for the tourism ecosystem and support decision-making.
- **Crisis response task force**, to be activated when a crisis hits, to coordinate the ecosystem crisis management efforts. This team can swiftly transition into response mode, leveraging the committee's established networks and resources to provide immediate assistance and support to impacted stakeholders. They can mobilise crisis response teams, activate communication channels, and deploy emergency relief measures to mitigate the impact on tourism businesses and destinations. Furthermore, NTOs can serve as trusted sources of information, disseminating accurate updates and guidance to tourists, businesses, and the broader public, thereby fostering confidence and minimising misinformation.

NTOs can also champion long-term recovery efforts, working in tandem with stakeholders to rebuild and revitalise the tourism ecosystem. They can advocate for targeted financial assistance, policy reforms, and sustainable recovery strategies to restore consumer confidence, stimulate demand, and drive economic recovery. Additionally, they can spearhead inspirational campaigns, leverage their influence to advocate for investments in infrastructure, destination marketing, and workforce development. This will lay the groundwork for a resilient and thriving tourism sector in the post-crisis landscape.

In countries with regional autonomy (or without a NTO), this role should be taken by a Regional Destination Management Organisation (DMO) with an operational and promotional mandate.

### **Key elements at Regional and Local Levels**

Regional and local tourism bodies are fundamental in tourism development and management.

**Member states should improve their governance structures by establishing or strengthening regional organisations** such as Regional Tourism

Organisations or Destination Management Organisations (DMOs). This initiative involves reviewing and refining existing operating models while implementing capacity-building activities tailored to regional needs. The principle of subsidiarity should be followed to ensure agile governance, allowing issues to be resolved at regional or local level whenever possible. These organisations must be equipped with the necessary tools, knowledge, and resources to effectively support the tourism ecosystem.

The analysis covers different types of organisations with different mandates, at national level.

- **Regional Tourism Authorities:** In destinations where, regional governments have autonomy from the national level, these regional organisations should assume the same roles and responsibilities that National Tourism Authorities (NTAs) have at national level.
- **Regional and Local DMOs:** They represent the interests of regional and municipal organisations. While some organisations have operational roles and are involved in policy implementation and support of the ecosystem, others are just entrusted with marketing and promotional activities, only being responsible for domestic promotion (in the national markets or neighbouring foreign regions).
- **Tourism Department within Municipalities:** They collaborate with regional/local DMOs supporting tourism policy implementation. Additionally, they manage tourism information systems, assisting tourists during their stays.

To ensure agile and effective regional and local tourism governance and facilitate coordination, the analysis suggests that **regions with autonomy should establish a regional tourism authority and a regional Destination Management Organisation (DMO) with both operational and promotional powers**. This dual structure would enable comprehensive management and promotion of tourism at the regional level, ensuring that the unique needs and strengths of each region are adequately addressed. Coordination with the national level should not be forgotten and should be done via regional tourism authorities.

**For regions dependent on the national level, and to facilitate coordination and efficiency, there should be only one Regional DMO with a strong operational and promotional mandate.**

**At the local level**, major cities (key tourism destinations) should have their own local DMOs, while other municipalities should house local tourism departments. These local organisations should focus exclusively on operational roles, leaving promotional efforts to the regional entities. This division of responsibilities allows local DMOs to concentrate on improving the visitor experience, managing

resources, and addressing immediate concerns, while regional bodies handle broader promotional strategies and marketing campaigns. This structure not only streamlines efforts and reduces redundancy but also ensures that both operational and promotional needs are met effectively, creating a more cohesive and efficient tourism governance framework.

DMOs at Regional level should therefore have the following main responsibilities:

- **Strategy Development:** develop strategy (including crisis management) for the development of tourism in the region, ensuring alignment with national strategy, other relevant regional strategies and with the different sectors of the tourism ecosystem.
- **Destination Management & Product Development:** oversee 1) coordination across different bodies and ensuring synergy in implementing tourism policies; 2) the management and development of tourist destinations, including conservation of natural and cultural heritage sites; 3) product development and tourism offers.
- **Policy Implementation:** enforce policy and regulations at regional level, monitoring and supporting tourism ecosystem stakeholders. They should provide the regional view and feedback on policy improvement needs.
- **Technical and Financial Support:** collaborate and support the tourism ecosystem to enhance the tourism product and experience, to build capacities in important areas of destination and tourism management, and support businesses to achieve common goals and address challenges. They should also support the ecosystem to find and apply funding opportunities.
- **Stakeholder coordination:** act as a connector between the regional government, private companies, and other relevant entities, promoting collaboration and data sharing among them. They should guarantee coordination with the NTO, coordination with regional government and municipalities, coordination with regional industry associations or main tourism stakeholders. They should ensure cross-sectoral collaboration, interacting with many sectors and stakeholders to benefit the broader tourism industry, including different actors that have regional mandates (police, fire services, etc.).
- **Data Collection and analysis:** develop their intelligence systems, with data that is relevant for their destination management.
- **Central hub of information:** for regional and local levels, providing relevant information for tourism operators, including reporting on data collected (e.g., monthly tourism performance of the region).
- **Destination promotion:** promote their respective regions as tourist destinations, mostly domestically and in neighbouring foreign regions.



DMOs at Local level should therefore have the following main responsibilities:

- **Strategy Development:** develop strategy for the development of tourism in the city municipality, ensuring alignment with regional and national strategy, other relevant regional strategies and with the different sectors of the tourism ecosystem.
- **Regulatory:** Monitor and provide licences for tourism operators (e.g., licences for restaurants and other tourism businesses).
- **Policy Implementation:** enforce policy and regulations, monitoring and supporting tourism ecosystem stakeholders at the local level.
- **Stakeholder coordination:** act as a connector between the municipality, private companies, and other relevant entities, promoting collaboration and data sharing among them. They should guarantee coordination with the regional DMO, coordination with municipalities and coordination with main tourism stakeholders. They should ensure cross-sectoral collaboration, interacting with many sectors and stakeholders to benefit the broader tourism industry, including different actors that have local mandates (police, fire services, etc.).
- **Product development and innovation:** product development, encouraging knowledge-based innovation, restructuring the tourist industry, and increasing value creation through cooperation between various parts of the tourism industry.
- **Supporting tourists:** developing tourist information systems and supporting tourists during their stays.

Regional and local tourism organisations are a **critical component in the context of crisis management, for several reasons:**

- **Agility and Adaptability:** Regional and local tourism organisations demonstrate agility and adaptability in crisis situations. Their proximity and deep understanding of the local tourism ecosystem allows them to anticipate and prepare for events that may impact tourism. They help devise strategic foresight and future-oriented planning processes that can enhance their ability to react swiftly and effectively to crises. These structures are well-positioned to coordinate the response effort at local level.
- **Risk Management and Crisis Response:** Regional and local organisations help develop comprehensive and iterative risk management plans, improving their preparedness for future crises. They can actively guide tourism businesses in creating their management plans to strengthen crisis resilience across the region.

- **Collaboration and Coordination:** These organisations are key in establishing collaborative environments to provide quick, targeted, and effective responses during crises. They can foster close relationships between government, industry, and other stakeholders which can accelerate responses, transformation measures, and ensure more robust risk assessment. They can take on the responsibility of designing and providing targeted support to local businesses, which may prove to be vital in navigating the challenges posed by the crisis. Furthermore, their accessibility makes it easier for stakeholders to reach out and collaborate with them, ensuring a more inclusive and participatory approach.
- **Streamlining Policy Making:** Regional and local organisations can contribute to the streamlining of policy-making processes, learning by experience in implementing policy, and enhancing evidence-based decisions.
- **Supporting Recovery:** Post-crisis, these organisations play a key role in devising recovery strategies, facilitating demand-led recovery, enabling tourism to adapt and transform aftershocks, and ensuring the sector is prepared for future crises.
- **Establishing Communication Channels:** They set up information channels at regional and local levels, allowing information exchange among relevant bodies and enabling the quicker design and implementation of policies when required.

### **Key tasks for Professional Associations**

Professional associations at both national and European levels play a critical role in representing and advocating for the interests of their respective sectors. These organisations are instrumental in:

- Monitoring legislative proposals, non-legislative measures, and activities that have a direct impact on their sectors. They ensure that any new regulations or policies are closely watched and assessed for their potential effects on the industry.
- Informing and advising their members on developments in national/European affairs. They keep their members updated on changes and trends in policies, helping them navigate the complex regulatory environment.
- Providing the sector's common positions on legislative proposals, planned initiatives, and consultation procedures. By presenting a united front, these associations effectively communicate the collective interests and concerns of their members.
- Representing the interests of the sector vis-à-vis national and European decision-making institutions. They act as the voice of their industry,

engaging with policymakers and other stakeholders to advocate for favourable outcomes and ensure that the industry's needs are considered in the decision-making process.

These professional associations are particularly vital during crises events. They can collaborate with national and European institutions to address the challenges faced by the tourism sector, demonstrating their essential role in supporting and safeguarding their industries at both national and European levels.

### **Importance of Horizontal, Vertical and Sectoral Coordination**

In addition to clear governance structure, roles and responsibilities, effective coordination is essential. The responsibilities in crisis preparedness and management should be defined in the destinations' crisis management plans.

Agile, flexible, and well-coordinated tourism policy approaches are a key part of responding and adapting to change and building a more resilient tourism system. The cross-cutting nature of tourism means tourism impacts and is impacted by many policy areas. Coordination across policy areas and levels of government is important to ensure that tourism is integrated into broader crisis response and risk management strategies. Once in place, it is also important that policies and programmes can be adapted to meet changing needs, while measures that impede tourism activities do not continue longer than necessary. Therefore, for tourism to be resilient, it is imperative to have a robust system of coordination that encompasses horizontal, vertical, and sectoral policy coordination. Effective tourism governance requires a complex coordination system, regardless of its organisational placement. Such coordination can be broadly categorised into three distinct approaches:

- **Horizontal coordination** refers to coordination among various actors/stakeholders operating at the same level. The objective of this coordination is to promote cooperation, information sharing, and joint decision-making among peers to address common challenges and opportunities. It happens across government departments and agencies to ensure that other parts of the government, with either an interest in or influence on tourism, can be fully involved in the planning and development. It is imperative for tourism authorities to coordinate with various relevant sectors, such as finance and economy during financial crises, the national security service in human-made crises, civil protection in natural disasters, or environmental agencies regarding climate change impacts. **Recognising the absence of a specific crisis mechanism tailored to the sector**, it becomes paramount to ensure that the tourism industry has a significant presence in all pertinent discussions. This guarantees that tourism's unique needs and challenges are thoroughly addressed, and that the sector maintains a "seat at the table" in decision-making processes concerning crisis management.

- **Vertical coordination** involves coordination and communication between different levels of tourism governance (i.e., national, regional, and local authorities). The aim of this coordination is to ensure that policies, regulations, and strategies at different governance levels are aligned and complementary. As referred before, coordination between the different levels is essential in crisis management. Policy decisions are made at different levels of government, but a cohesive approach with shared objectives, based on robust cooperation and planning, is critical for building a resilient tourism sector. While national governments may have the final say in budgetary matters, local governments are often better equipped to implement programmes that cater to the needs of tourism businesses. Local governments have a closer relationship with businesses and can assist in designing and implementing programmes, evaluating outcomes, and adapting to changes if necessary. The subsidiarity principle is especially important in the tourism sector.
- **Sectoral coordination with the industry** refers to coordination and communication between different sectors of the tourism ecosystem and between the public and private sector. The tourism ecosystem is highly interconnected, relying on various sectors. Sectoral coordination aims to foster cooperation between these sectors to enhance the overall tourism experience and support sustainable tourism development.

Crisis events can have local, regional, national, and European impacts, and tourism coordination efforts should be led by the tourism organisation at the appropriate level. Nevertheless, regional, and local organisations, should work closely with NTOs, for guidance and alignment, and to ensure comprehensive and effective support is given to tourism businesses.

The annex ([Coordination required for different types of crisis events](#)) provides an example of the necessary coordination for different types of crisis events.

## 9.2. Crisis preparedness improvement

Governance should be supplemented with support mechanisms to improve the resilience and preparedness of the ecosystem for future crisis events, as per recommendations provided in the next chapter.

Tourism organisations, including NTOs and regional and local DMOs, should guarantee the **alignment of tourism strategies** with overarching national, regional, and local strategies. National, regional, and local tourism strategies should also be aligned. Aligning tourism strategies with overarching national, regional, and local strategies is crucial for maximising their effectiveness and impact. It ensures tourism initiatives are consistent with broader economic and social goals, promotes a coordinated vision for sustainable and resilient development, and ensures they receive the necessary (technical and financial) support. Moreover, alignment between local, regional, and national tourism

strategies facilitates seamless cooperation and integration. It ensures that policies are mutually supportive, strengthening institutional frameworks.

The **tourism strategic development should prioritise resilience building** and focus on designing initiatives aimed at addressing key vulnerabilities, including labour shortages, climate change and overtourism.

Destinations and sectors should **develop or update their crisis management plans with clear protocols and well-defined responsibilities**, to improve the preparedness of the ecosystem. This is a crucial first step to enhance preparedness and the effectiveness of response effort for future crisis events. Again, incorporating crisis management into broader planning efforts is essential for strong structural integration within tourism-related institutions. This leads to a unified approach that enhances crisis preparedness and response. Crisis management plans should be continuously improved and updated, adapting to evolving environments, to maintain their effectiveness.

Destinations and sectors should also **implement risk assessment mechanisms and conduct regular risk sensing** to identify early warning signals of potential crises. The tourism ecosystem, without systematic risk evaluation, remains vulnerable to unexpected disruption.

Tourism organisations must be agile and quick to act, in order to enhance preparedness and their response. **Streamlining regulatory frameworks and processes** is vital for creating an agile tourism ecosystem. They should work towards developing a set of policies and measures targeted for different crisis events, which are ready to implement when a crisis hits so as to provide effective support to tourism organisations, businesses and workers.

Destinations should also develop and implement clear **communication channels to provide access to accurate information**, which is a critical need of the tourism ecosystem to ensure it effectively responds to and recovers from future crisis events. In times of crisis, transparent communication ensures that relevant information reaches all stakeholders, including government authorities, tourism businesses, and tourists. It also enables the dissemination of vital updates, safety protocols, and travel advisories, allowing businesses to adapt their operations and to make informed decisions.

Tourism organisations, mostly at regional and local levels and SMEs, need to **develop capacity in the fields of resilience building and crisis preparedness**. It is therefore important to **develop and implement training programmes**, guidelines, twinning, and knowledge sharing activities, so that the ecosystem collectively improves its preparedness.

These organisations should also be equipped with the necessary resources. It is crucial to **prioritise national and regional funding to support resilience-building and crisis preparedness initiatives**. Sufficient resources allow for the investment in proactive measures, enhancing the ecosystem's ability to withstand

and adapt to crises. It also enables the deployment of timely response measures during a crisis, such as emergency support for affected businesses and destinations, communication campaigns to rebuild trust, and targeted recovery initiatives.

The **availability and quality of data** are critical for crisis preparedness, response, and recovery. The tourism ecosystem needs available, reliable, centralised, frequently updated data sources and indicators to make informed decisions and forecast/predict in advance and monitor the impacts (e.g., severity and length) of a crisis event. By identifying and analysing these indicators, tourism ecosystem stakeholders can anticipate the expected impacts of crises and take preventive measures to mitigate them.

It is also important to develop **open data collection & analysis platforms** to improve tourism intelligence, creating organised environments for collecting, integrating, storing, and processing tourism data from various information sources. The goal is to ensure intuitive, reliable, and useful information for various stakeholders to extract insights, generate forecasts, and derive conclusions that facilitate decision-making and destination management, as well as help the destination recognise early warning indicators and manage crises.

Finally, it is important to build the capacity of destination and business managers to ensure that public and private tourism organisations have the appropriate understanding of the existing data sources, indicators, tools, and systems and of their use and limitations.

## 10. Policy recommendations

Thirty-one policy recommendations were drawn up considering the insights gathered in the project and the identified needs of stakeholders: 13 aimed at the national/regional levels, 11 at the EU level, and 7 at professional associations. These cover the three identified primary focus areas (see below) and will be uploaded on the Transition Pathway for Tourism Platform:

- **Strengthen Governance and Coordination:** Strengthen governance structures and the mandate of tourism organisations and improve collaboration across all levels – EU, national, regional, and local – ensuring seamless integration and alignment within the ecosystem.

Recommendations for the national and regional levels include the **establishment of clear governance models with well-defined roles and responsibilities**. These models should focus on tourism development, resilience building, crisis preparedness and management. **Coordination efforts of key activities are recommended at the highest administrative level**, led by NTOs or Regional DMOs, which should be equipped with **strong operational and promotional** mandates. Regional and local DMOs should also be equipped with sufficiently broad operational and promotional mandates to effectively support tourism businesses operating at those levels. **Coordination is of utmost importance**. It is therefore recommended that these organisations engage in **vertical, horizontal, and sectorial coordination** to ensure collaborative management for tourism development, crisis preparedness and management.

It is recommended, at EU level, to leverage the existing expert group **Together for EU Tourism (T4T)**. **This group will assess industry sentiment and prepare the T4T Resilience Working Group to be the EU-level Crisis Management Group**.

It is recommended, in line with recommendations for national and regional destination management organisations, that **professional associations create a dedicated resilience and crisis management team to support their sector and enhance collaboration with the public sector**.

- **Build Resilience and Improve Crisis Preparedness:** Develop plans and frameworks and provide the necessary tools and mechanisms to build resilience and effectively prepare for, respond to, and recover from crisis events.

Recommendations at the national and regional levels include enhancing **tourism strategic plans to build resilience and address pressing vulnerabilities**, such as labour shortages, climate change, and overtourism. The recommendations further emphasise the importance of

providing the **necessary technical and financial resources** to support resilience building, crisis preparedness, and crisis management, with particular **focus on SMEs**.

It is also recommended to **develop or improve crisis management plans, establishing crisis communication platforms, and develop a set of measures** to be activated when a crisis occurs. This will create preparedness for future events.

Recommendations at the EU level include **leveraging the EU Tourism Platform to enhance knowledge sharing, collaborative work, and twinning opportunities**. This should be supplemented by **ensuring systematic funding and implementing long-term technical assistance** to support the resilience building and crisis preparedness of the tourism ecosystem.

The development of an **EU Risk Assessment Framework** is recommended to improve risk sensing and crisis preparedness and to facilitate comparability and knowledge sharing about risks and mitigation measures. It is additionally suggested that the **Re-open EU platform** be prepared **to serve as the one-stop shop for EU crisis communication**. The implementation of **a pilot project to establish a Tourism Resilience and Crisis Preparedness Innovation Lab** is also recommended.

The recommendations for professional associations are to strengthen their sectors' capacity in resilience, crisis preparedness, and management. This involves **developing guidelines and delivering training, tools, and materials to tourism businesses**.

- **Facilitate Deployment of Data:** Ensure that data pertinent to the tourism sector is readily available and accessible to stakeholders and governance actors, with capacities to make use of it.


Recommendations include **expanding data sources and developing advanced platforms for data collection and analysis** to generate insights and support destination management at both the national and regional level. This should be complemented at EU level by the **improvement of Eurostat and EU Tourism Dashboard data**, along with the **development of specialised data dashboards with specific sector data** by professional associations.




## 10.1. Policy recommendations for National/Regional Level


**Table 9. List of policy recommendations for the national, regional, and local levels**

Strengthen Governance and Coordination
Ensure a clear governance model for destination management at all relevant levels with well-defined roles and responsibilities for tourism development, resilience building and crisis management. 
Ensure that there is common coordination mechanism for tourism resilience building and crisis management at the highest administrative level of the country, even if the competences are at regional/local level, including policy steering, financial support, skills development, and communication alignment towards international audiences. 
Secure broad enough mandate for operational actors at regional and local levels (Destination Management Organisations, DMOs) to provide effective support both in normal and crisis situations to tourism ecosystem stakeholders at their levels, including focused policies, financial support, skills development and promotional activities. 
Ensure that at each level of destination governance (national, regional, local) there exists a horizontal governance structure for tourism development, resilience building and management, which includes public authorities across areas with interest or influence in tourism, private tourism stakeholders (companies, residents) and other relevant stakeholders (e.g. civil protection actors). 
Establish vertical coordination mechanisms between national, regional, and local levels, which supports tourism that mitigates risk factors (e.g. environmental degradation or overtourism), builds resilience across the country (e.g. through diversification) and facilitates putting in place actions for crisis preparedness and management. 


 Click to go to the recommendation fiche


### Build Resilience and Improve Crisis Preparedness


Develop or revise destination-specific Tourism strategy (leveraging vertical and horizontal coordination mechanisms) to define objectives and actions which align with national/regional/local tourism policy, consider local specificities and include actions to support resilience building and addressing key vulnerabilities, such as climate change, staff shortages and overtourism. 


Create and regularly update a Crisis Management Plan for each key destination, leveraging both horizontal and vertical tourism coordination mechanisms together with a pre-defined set of policies and measures to be activated when a crisis hits and to provide effective assistance to vulnerable tourism businesses (particularly SMEs), workers, and tourists. 


### Build Resilience and Improve Crisis Preparedness

Optimise at national, regional and local levels (leveraging vertical coordination mechanism) the reach of existing public communication mechanisms for crisis communication and information (also considering reverse 112 system for urgent communications), or develop new ones, to effectively inform tourism businesses, tourists and residents in case of crisis on the measures in force. 


Develop and deliver training programs, adapted learning materials and promote knowledge sharing and collaboration to build capacity for public and private sector and tourism professionals in resilience building, crisis preparedness and management. 


Prioritise available funding from the national and regional operational programs to support resilience building and crisis preparedness for tourism authorities at local/regional levels and for SMEs. 


Provide technical assistance for tourism SMEs to improve their resilience, crisis preparedness and response to crises, and to ensure their capacity to take advantage of the available funding opportunities at local, regional, national and EU level for their development. 

 [Click to go to the recommendation fiche](#)

### Facilitate Data Deployment











Assess the data needs of tourism stakeholders in your destination and expand the data source base accordingly, considering both public and private data providers and partnerships with industry. 

Develop a data platform, which allows destination management and relevant tourism ecosystem actors to explore, integrate, and analyse data in order to get insights to the tourism activity during normal and possible crisis periods. 


 [Click to go to the recommendation fiche](#)


## 10.2. Policy recommendations for EU Level


**Table 10. List of policy recommendations for the EU level**


Strengthen Governance and Coordination
Incorporate as part of the tasks of the Commission's informal expert group Together for EU Tourism (T4T), assessing industry sentiment for improve the ecosystem's capacity to early identify potential disruptions. 
Prepare the Together for EU Tourism (T4T) resilience working group to be established as the EU-level tourism crisis management group if needed. 
 <a href="#">Click to go to the recommendation fiche</a>
Build Resilience Improve Crisis Preparedness
Leverage the EU Tourism Platform to enhance knowledge sharing, collaborative work and twinning opportunities, by actively engaging tourism actors with the help of the resilience working group developing and sharing materials and animating discussions. 
Ensure systematic availability of funding resources to support local and cross border resilience building and crisis preparedness. 
Create a common framework to support tourism destinations and businesses in assessing and sharing information about risks and mitigation measures, and facilitate broad uptake of such a tool. 
Ensure the preparedness of Re-open EU platform and mobile App to be relaunched as a one-stop shop for EU crisis communications, if needed, to provide information to travellers and tourism businesses. 
Develop a pilot project to implement a Tourism Resilience and Crisis Preparedness Innovation Lab, a consortium uniting research institutes and startups developing and testing innovative solutions which could be established a long-term policy support mechanisms for crisis management in tourism. 
Implement a long-term technical assistance offer to support destination and tourism ecosystem stakeholder to build resilience and crisis preparedness. 
 <a href="#">Click to go to the recommendation fiche</a>

## Facilitate Data Deployment

Leverage EU digital innovation hubs to develop and deliver data literacy training for tourism management organisations and SMEs to improve their understanding of the existing data sources, indicators, tools and systems and of their use and limitations. 











Enhance Eurostat's tourism data offer with improved timeliness, frequency, coverage, and usability, building on collaboration with National Statistical Institutes and tourism authorities in the Member States. 

Identify data available at national and regional levels in a comparable manner across several EU Member States and include it on the EU Tourism Dashboard to improve EU-level data availability for tourism development and policy monitoring to improve crisis preparedness and management. 

 [Click to go to the recommendation fiche](#)

## 10.3. Policy recommendations for Professional Associations

**Table 11. List of policy recommendations for cross-border professional associations**

Strengthen Governance and Coordination
Engage in the horizontal and vertical tourism management structures established for the countries/region/cities to support collaborative tourism governance and to build resilience and develop crisis preparedness and management in the EU tourism ecosystem. 
Create a dedicated resilience and crisis management team that supports sector's tourism businesses at EU, national, regional and local levels (as relevant) in developing improved resilience, crisis preparedness, and effective crisis management strategies. 
 <a href="#">Click to go to the recommendation fiche</a>
Build Resilience and Improve Crisis Preparedness
Develop guidelines to improve the resilience and crisis preparedness of the tourism businesses in the sector, with examples to address common risks and vulnerabilities. 
Improve the skills of managers, employees and entrepreneurs on risk preparedness and management with trainings tailored to the sector, with relevant scenario exercises. 
Raise awareness of the importance of resilience building among all members by including resilience building and crisis preparedness as part of regular communications, conferences and events to the sector. 
 <a href="#">Click to go to the recommendation fiche</a>
Facilitate Data Deployment
Establish a data resource available to members on sector-relevant data, and make as much data as possible available publicly, to support tourism resilience building at different destinations. 
Develop openly available learning material for the sector about available data sources and how to use them for developing their tourism activities and for recognising issues to be addressed for better resilience. 
 <a href="#">Click to go to the recommendation fiche</a>

## 11. Best practices & Case Studies

A set of best practices and a set of case studies were identified during the first and second stages of the project, aimed at addressing common vulnerabilities in tourism governance and enhancing crisis management preparedness. These practices are diverse and cover a range of specific measures, crucial for improving the resilience and sustainability of the tourism ecosystem.


The selected practices span multiple levels of governance, including European, national, and regional levels, and involve different types of organisations. They cover various geographies and topics within the tourism sector, ensuring a comprehensive approach to enhancing tourism governance and crisis preparedness and management. The first set provides examples of best practices implemented by organisations and destinations in response to the COVID-19 pandemic. The second set of case studies showcase examples of action plans developed by the service beneficiaries of the project to strengthen governance and crisis preparedness.

The best practices and case studies documents have been uploaded and can be found on the [EU Tourism Platform](#) and in the annex section of this report.

### 11.1. Best practices implemented by organisations and destinations in response to the COVID-19 pandemic











**Table 12. List of best practices implemented in response to the COVID-19 pandemic**


	Level	Geography
<a href="#">Informal Resilience Tourism Ad hoc group</a> 	European	N.A.
<a href="#">High-Level Working Group on Tourism</a> 	National	Finland
<a href="#">Local Coordination between ski destinations</a> 	Regional	Austria
<a href="#">Tourism Advisory Board</a> 	National	Estonia
<a href="#">Re-open EU</a> 	European	N.A.
<a href="#">Clean &amp; Safe Seal</a> 	National	Portugal
<a href="#">Guarantee schemes for vouchers</a> 	National	Denmark
<a href="#">Campaign “Tourism Makes Ljubljana ...”</a> 	Local	Slovenia
<a href="#">EU Tourism Dashboard</a> 	European	N.A.
<a href="#">Cascais COVID War Room</a> 	Local	Portugal

 Click to go to the best practice fiche

## 11.2. Case studies of action plans to strengthen governance and crisis preparedness

**Table 13. List of case studies of action plans to strengthen governance and crisis preparedness**

	Level	Geography
<a href="#">Montenegro NTO</a> 	National	Montenegro
<a href="#">National Tourism Organisation of a Southern European Country</a> 	National	Southern Europe
<a href="#">National Tourism Organisation of a Northern European Country</a> 	National	Northern Europe
<a href="#">Timis County Council</a> 	Regional	Romania
<a href="#">DMO Provincia Latina</a> 	Regional	Italy
<a href="#">Rheinland-Pfalz Tourismus GmbH</a> 	Regional	Germany
<a href="#">City of Dubrovnik</a> 	Local	Croatia
<a href="#">Municipality of Postojna</a> 	Local	Slovenia
<a href="#">Tourismusverband Linz</a> 	Local	Austria
<a href="#">European Exhibition Industry Alliance</a> 	European	N.A.

 Click to go to the case study fiche

## Appendix – Tools for crisis management

A set of guidance and collaboration material (tools for crisis management) was developed to support the delivery of advisory services to destinations and cross-border professional associations. These tools can be utilised by other stakeholders to enhance their resilience and crisis preparedness. All the material produced during the project can be found at the [EISMEA webpage](#).

### I. Crisis management learning journey

A learning journey of the [EU Academy](#) – e-learning course – was developed using the knowledge and insights gathered from this project. This course features user-friendly learning material designed to enhance resilience, improve governance and crisis response skills across the tourism ecosystem.

The EU Academy is an online learning platform launched by the European Union to provide high-quality educational resources and training opportunities related to EU policies, priorities, and initiatives. It is aimed at professionals, students, and anyone interested in European affairs, and it offers a wide range of courses, webinars, and learning material on topics such as sustainability, digital transformation, and international cooperation. The platform is designed to foster knowledge-sharing and skill development, supporting the EU's mission to promote continuous learning and informed participation in European matters.

With a series of engaging modules, participants will delve into topics such as crisis readiness, governance models, risk landscape evaluation, crisis management resilience, stakeholder engagement, and best practices for crisis response. Each module offers valuable insights and practical guidance, from understanding the fundamentals to creating action plans and utilising data for crisis management.

The learning journey is composed of the following modules:

- 1. Your learning journey:** introductory module, to ensure participants have a personalised and impactful learning journey.
- 2. Introduction to Crisis Management in Tourism:** module designed to equip participants with essential crisis management terminology and knowledge. They will also learn about the impacts and consequences of crisis events on the tourism ecosystem.
- 3. Assess your Crisis Readiness:** through an interactive survey, participants will be able to identify their current level of crisis management preparedness.
- 4. Your Governance Model:** with a set of reflective questions, participants are invited to think critically about their organisation's governance structure.
- 5. Your Risk Landscape:** this module offers hands-on experience in conducting a comprehensive risk assessment from start to finish. It guides



participants step-by-step through every aspect of risk assessment, using a risk register table to help them prioritise and tackle the most critical risks first.

- 6. Assess and Strengthen your Crisis Management Resilience:** module designed to support participants, through a series of targeted questions, to perform a SWOT analysis.
- 7. Who else is involved?:** this module delves into the roles and responsibilities of public and private actors in the tourism ecosystem, collaborative methods, and strategies for enhancing tourism destination governance.
- 8. Using Data to Manage Crises:** module designed to equip participants with various data sources and tools to help participants prepare, respond, and recover from crisis events.
- 9. What to do when a crisis hits?:** this module delves into the specific measures that can be implemented to respond effectively to a crisis event.
- 10. Create your Action Plan:** in this module, participants will be guided into developing an action plan with a range of actions to be taken to improve their resilience and crisis management preparedness.
- 11. The Crisis Management Plan:** in this module the participants are provided with a set of guidelines and best practices to build their crisis management plan.

In the following chapters of the appendix, you will find offline versions of some of this material, which will be presented in an interactive and engaging format during the learning journey.

## II. Crisis management framework: a guide to prepare, respond and recover from crisis events

The Tourism Crisis Management Framework refers to a set of **thirty-seven key actions** generated to provide **support to the tourism ecosystem** (more specifically destinations and cross-border professional associations), **for preventing, managing and mitigating crisis events**. This framework includes key actions for each crisis stage (i.e., prepare, respond, recover) and for each of the three main areas of tourism crisis management (i.e., measures for the tourism ecosystem, tourism governance structures and processes and key data elements and sources to assess vulnerabilities).

Each key action contains a set of underlying measures (checklist). Note that this checklist is only a guide. It does not contain all the components, contingencies or options required by each organisation or destination for its specific crisis management process.

The Tourism Crisis Management Framework comprises **three stages** that are the pillars of an integrated and effective crisis management approach:

1. **Crisis Preparedness:** refers to the level of readiness and capabilities an organisation possesses to effectively respond to and manage crises or emergency situations. It involves the proactive measures and planning put in place to minimise the impact of a crisis and ensure a swift and coordinated response when one occurs.
2. **Crisis Response:** refers to the immediate action and measures taken by an organisation in response to a crisis. It involves executing the crisis management plan, mobilising resources, and implementing strategies to mitigate the impact of the crisis and protect the organisation's vital interests.
3. **Crisis Recovery:** refers to the period following the immediate crisis response, during which an organisation works to restore normal operations, rebuild trust and reputation, and recover from the impact of the crisis. Crisis recovery is focused on moving the organisation towards stability and resilience after the disruptive event.

**Three key areas** of tourism crisis management were identified:

- I. **Measures for the tourism ecosystem:** Refer to the various measures used by destinations and cross-border associations to address challenges, mitigate negative impacts, and facilitate recovery. These measures are designed to sustain the tourism industry before, during and after the crisis.
- II. **Tourism governance structures and processes:** Refer to the organisational arrangements and decision-making procedures put in place to manage the impact of a crisis. These structures and processes

involve coordination between stakeholders to ensure an effective and timely response.

- III. **Key data elements and sources to assess vulnerabilities:** Refer to the collection and analysis of specific data elements related with tourism. These elements help identify the potential risks/impacts and enable destinations and cross-border professional associations to develop appropriate crisis management strategies.

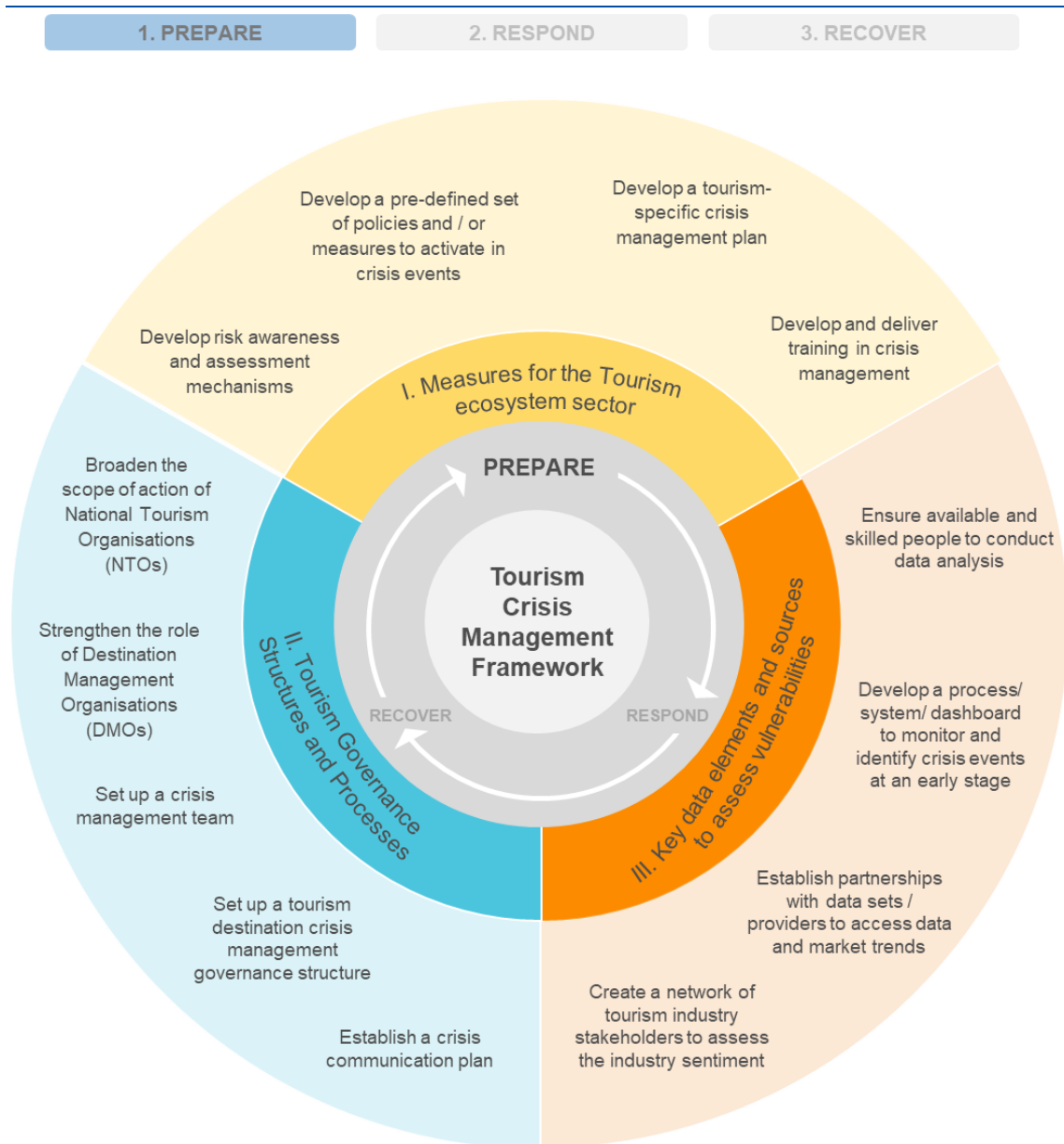
The Tourism Crisis Management Framework provides an **overview to users** as it identifies the actions the tourism ecosystem (**destinations** including the different types of public organisations - NTOs, NTAs, DMOs and other public tourism organisations - and **cross-border professional associations**) should **collectively undertake to prepare, respond, and recover from crisis events**.

A careful analysis was conducted to identify and match the specific actions with the following types of organisations that hold responsibilities in crisis management, considering the different roles, responsibilities, and mandates of different organisations within the tourism ecosystem:



Figure 26. Overview of the Type of Organisation and its main responsibilities

**Note:** The following checklists identify which **action points** are **relevant to the different types of organisations**. Nevertheless, it is important for the different types of organisations to gain a comprehensive understanding of the complete set of actions. This understanding empowers them to comprehend their role within the overall ecosystem, enabling them to better prepare for the necessary coordination with other organisations and identify the specific requirements they should seek from them.



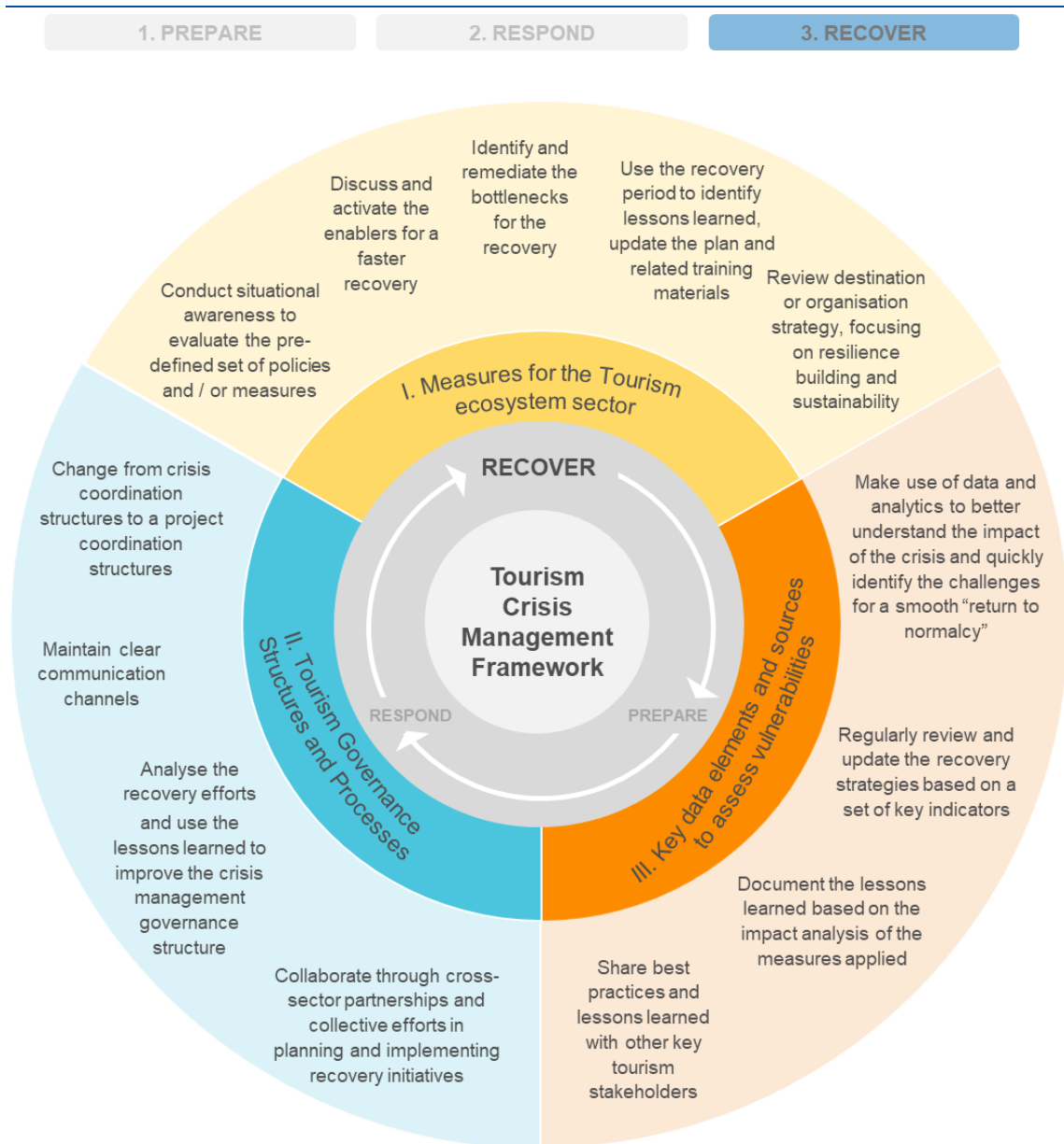
**Figure 27. Crisis Management Framework: PREPARE STAGE**

The annex ([Crisis management framework: checklists](#)) (table 26) contains the detailed checklist for each action.



**Figure 28. Crisis Management Framework: RESPOND STAGE**

The annex ([Crisis management framework: checklists](#)) (table 27) contains the detailed checklist for each action.



**Figure 29. Crisis Management Framework: RECOVER STAGE**

The annex ([Crisis management framework: checklists](#)) (table 28) contains the detailed checklist for each action.

### III. Key data elements and sources to assess vulnerabilities

- Why do destinations/associations need data?

Prepare	Respond	Recover
<ul style="list-style-type: none"> <li>• Risk sensing</li> <li>• 24/7 monitoring, early warning and detection</li> <li>• Forecasting and nowcasting</li> </ul>	<ul style="list-style-type: none"> <li>• Situational awareness</li> <li>• Decision-making</li> <li>• Communication and public information</li> </ul>	<ul style="list-style-type: none"> <li>• Damage assessment</li> <li>• Monitoring progress</li> <li>• Lessons learned</li> </ul>

Data and information management processes can be used for the following purposes **to prepare for a crisis**:

- **Risk sensing:** There are risk sensing and horizon scanning systems and processes in place to provide early warnings in the near/medium/long-term.
- **24/7 monitoring, early warning and detection:** Monitoring activities include real-time information and data feeds from multiple internal and external sources, including social and traditional media. The capability is in place to collate and distil raw information into a single, common threat picture with early warning mechanisms, to enable mitigating actions to be promptly taken.
- **Forecasting:** Forecasting analysis is a tool that enhances the assessment of a situation and explores potential outcomes. It achieves that by analysing data and possible/alternative scenarios to make informed decisions as a proactive step. Forecasting uses historical quantitative data, and relies on data from the past and present, to better envision what the future might hold.

Data and information management can be used for the following purposes **to respond to a crisis**:

- **Situational awareness:** Real-time data and information management is vital for monitoring the evolving situation during a crisis. It allows data to be gathered and analysed from various sources, such as social media, statistical offices, international organisations, and intelligence agencies. This analysis provides an understanding of the current situation, its impact and initial decisions or action that may be required. This is done by identifying the details of who, what, where, when why and how.
- **Decision-making:** Timely and accurate data empowers decision-makers to make informed evidence-based choices when deploying response teams and coordinating efforts. It ensures effective communication, collaboration, and coordination among the various stakeholders involved

in the response. Moreover, in a crisis situation, timely and accurate data, when it has been interpreted correctly, allows the destination to predict the impacts of a crisis, anticipate the challenges of specific tourism sectors (mainly those that can provoke a domino effect) and ultimately take decisions to mitigate them.

- **Communication and public information:** Managing data and information supports the dissemination of accurate and timely updates to the public, stakeholders, and media. It helps to provide critical instructions, safety measures, and situational updates. It enhances public trust of public/government authorities, thereby amplifying the effectiveness of the implemented mitigation measures and reducing misinformation.

Data and information management can be used for the following purposes **to recover from a crisis**:

- **Damage assessment:** Data and information management aids in assessing the extent of damage caused by the crisis. It enables organisations to evaluate the impact on infrastructure, economy, the environment. This assessment helps prioritise recovery efforts and allocate resources accordingly.
- **Monitoring progress:** Effective data management facilitates the monitoring of progress of recovery initiatives. It helps track key performance indicators, measure the effectiveness of implemented strategies, and make necessary adjustments to ensure a smooth recovery process.
- **Lessons learned:** Data and information collected during and after a crisis provide valuable insights for future preparedness. By analysing this information, organisations can identify gaps, strengths, and areas for improvement, enabling them to enhance their crisis management capabilities. This may involve re-evaluation and adaptation of organisations' strategies and action taken, based on the anticipated demand. By actively recovering and responding to the forecasting demand, organisations can regain their market position faster while mitigating, or even preventing, the possible challenges.

- How could destinations/associations benefit from mutually leveraging their data?

ACTION	GOAL
By mutually exchanging information and/or data through the setup of a <b>common shared platform</b> .	Understand the current state of tourism in different countries but also make informed decisions for the well-being of visitors.
By establishing alliances and holding <b>regular meetings/gatherings with pools of experts</b> from the tourism sector.	Exchange viewpoints, best practices, tourism insights but also benchmark against one another.



- How can destinations/associations decide on the most appropriate level of frequency for updating data?
  - **By performing a cost-benefit analysis to carefully assess the data** needs, frequency of data update and in which data sources to invest.
- What are the instruments most used to process data?
  - **Off-the-shelf digital tools and software products** such as SPSS, GIS, Python, Online Survey Software, PBI, Limdep, Jamovi, SAS, and API connector management software.
  - Own **data visualisation dashboard(s)** either developed in-house or by external experts.
  - **Existing dashboards and statistical methods** developed by official organisations at national level or European level.

Always consider performing a cost-benefit analysis to define the most cost-effective solutions for data usage, also keep in mind user friendliness.

You can find information about relevant data sources and indicators in module 7. Using Data to Manage Crises of the learning journey.

## IV. Exercises to support destinations to build their own action plan for improving preparedness to deal with crisis.

### i. Risk Assessment

**Main objective:** Identify the likelihood and impact of risks that may disrupt the tourism ecosystem and, consequently, the destination/cross-border professional association.

**Tasks:**

- Brainstorm on potential risks (note: these risks can include natural & environmental, health-related, human-made, financial and technological factors that could disrupt the ecosystem). Use the risk register to register them ([Template 1. Risk Register Table](#)).
- Assess likelihood of each risk occurring (considering, for example, historical data, trends, expert opinion, and any relevant statistical data). Assign a probability rating to each risk, ranging from “1 - Very Low” to “5 - High” (See Table 14. Risk matrix (Likelihood and Impact)).
- Ascertain the potential impact of each risk on the tourism ecosystem. Consider factors such as capabilities, financial implications, operational disruptions, domino effects, reputational damage, legal consequences, and overall industry stability. Assign an impact rating to each risk, ranging from “1 - Minimal” to “5 - Extreme” (See Table 14. Risk matrix (Likelihood and Impact)).

**Table 14. Risk matrix (Likelihood and Impact)**

	Impact				
Likelihood	1 – Minimal	2 – Significant	3 – Serious	4 – Severe	5 – Extreme
1 – Very low	1	2	3	4	5
2 – Low	2	4	6	8	10
3 – Moderate	3	6	9	12	15
4 – High	4	8	12	16	20
5 – Very High	5	10	15	20	25

- Based on the identified likelihood and impact, calculate the Risk Level (Risk Level = Impact \* Likelihood).

- Using a risk matrix or a similar visual tool, plot the identified risks based on their likelihood and impact ratings.
- Develop and analyse potential risk mitigation strategies for all the risks with a “High” and “Very High” risk rating (see Table 15 to understand the risk acceptance criteria and resulting action based on the Risk Level). These mitigation strategies will serve as an input for the brainstorming exercise on measures to improve governance and resilience.
- Summarise key findings and conclusions from the exercise.

**Table 15. Risk Acceptance Criteria and Resulting Action considering the Risk Level**

Risk Level	Risk Acceptance Criteria and Resulting Action
Low	Risks categorized as low are generally accepted as part of normal business operations. These risks are considered manageable and may not require immediate action or the allocation of significant resources. However, it is important to remain vigilant.
Moderate	<p>Moderate-level risks can be acceptable or unacceptable based on professional judgement. The action to be taken for this type of risks include:</p> <ol style="list-style-type: none"> <li>1. Develop contingency plans or response strategies to address the risk;</li> <li>2. Assign responsibility to a team to monitor the risk closely and take appropriate action if needed;</li> <li>3. Implement preventive measures to reduce the likelihood of the risk occurring;</li> </ol> <p>Set up monitoring mechanisms to detect early warning signs of the risk escalating.</p>
High	<p>High-level risks should be considered as unacceptable. The following action should be taken:</p> <ol style="list-style-type: none"> <li>1. Take immediate action to mitigate or control the risk;</li> <li>2. Formulate a detailed response plan to manage the risk effectively;</li> <li>3. Escalate the risk to relevant stakeholders/decision-makers for their attention;</li> </ol> <p>Implement proactive measures to reduce the likelihood or impact of the risk.</p>
Very High	<p>Very High-level risks should be considered as unacceptable and the top priority in terms of risk management. The following action should be taken:</p> <ol style="list-style-type: none"> <li>1. Activate emergency response procedures (if applicable);</li> <li>2. Mobilise all necessary resources and expertise to urgently address the risk;</li> <li>3. Engage relevant stakeholders and senior management to ensure appropriate attention and support;</li> <li>4. Consider implementing risk transfer or contingency plans if feasible;</li> </ol> <p>Continuously monitor and reassess the risk to adapt the response as needed.</p>

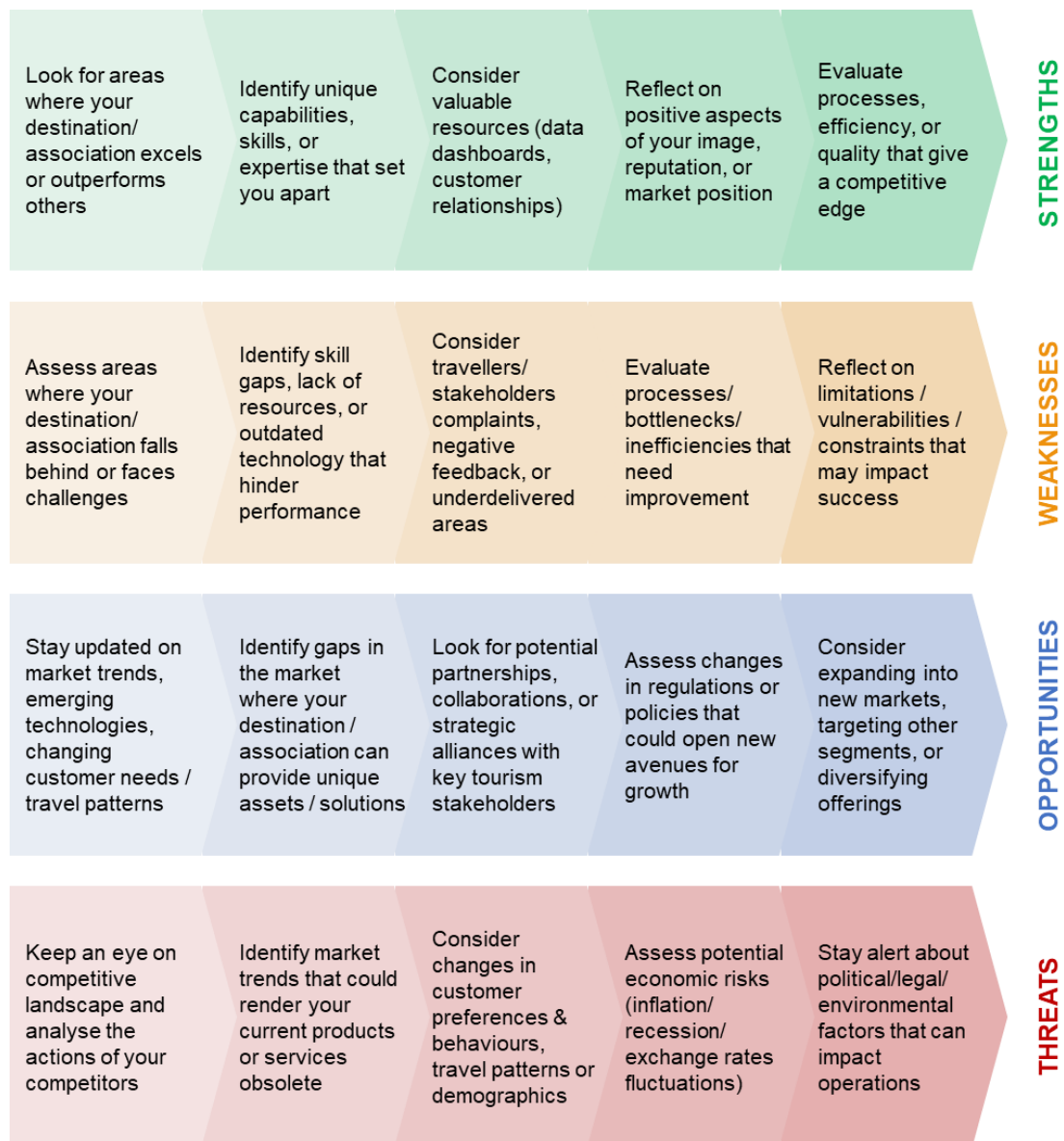
**Main output:** Filled risk register table identifying all the risks that may disrupt the industry, their short description, their impact, likelihood and risk level and possible mitigation measures to be applied for the risks with a “High” and “Very High” risk rating.

## ii. SWOT Analysis

**Main objective:** Identify your strengths, weaknesses, opportunities, and threats in a potential crisis context.

**Tasks:**

- Brainstorming on the destination/association’s strengths and weaknesses.
- Brainstorming on the potential opportunities and threats facing the destination/association.
  - Consider external factors such as market/travel trends, competition, regulatory changes, etc.
- Summarise the key findings and conclusions from the SWOT analysis on [Template 2. SWOT Analysis.](#)



**Figure 30. Path to identify each factor**

**Main output:** The main output of this step is a list of strengths, weaknesses, opportunities, and threats that will serve as an input for the following exercises.



Figure 31. Example of a fictional organisation's completed SWOT table

iii. Brainstorming and prioritisation of measures to improve tourism governance and resilience.

**Main objective:** Find initiatives that will reinforce strengths, ensure the ability to realise opportunities, and minimise weaknesses and threats. The framework below can guide this exercise. Prioritise those initiatives based on their effort and impact.

	Strengths	Weaknesses
Opportunities	How do I use the strengths to take advantage of the opportunities?	How do I overcome the weaknesses that prevent me from taking advantage of my opportunities?
Threats	How do I use my strengths to reduce the likelihood of the impacts of threats?	How do I overcome the weaknesses that will make the threat real?

⇓

**List of potential action**

**Figure 32. Framework to brainstorm about potential initiatives**

**Tasks:**

- Brainstorming on the potential action.
- Classify each action under “Small quick wins”, “No brainers”, “No gainers” or “Big slow wins” depending on the impact and effort required for each of them.
- Structure the prioritised initiatives (see [Template 3. Prioritisation matrix](#))

**Main output:** Prioritisation matrix with the actions assigned to each quadrant.

#### iv. Implementation roadmap

**Main objective:** Select the initiatives to include in the action plan ([Template 4. Selection of Actions](#)), set realistic time horizons and their expected implementation ([Template 5. Definition of Time Horizons](#)) and identify the key steps required to fully implement each action ([Template 6. Action Plan](#)).

**Tasks:**

- Select the initiatives to include in the action plan, considering ([Template 4. Selection of Actions](#)):
  - Including initiatives from different quadrants helps to create a **balanced portfolio of projects**, ensuring a mix of short-term wins and long-term strategic initiatives.
  - Selecting “Small quick wins” ensures **immediate benefits** and demonstrates progress to stakeholders.
  - Including “Big slow wins” ensures that the roadmap incorporates initiatives that have the potential to bring **substantial changes and drive innovation**.
  - Including “No brainers” ensures **immediate benefits and contributes to the overall success** of the destination/association.
  - Considering initiatives from different quadrants allows a **balanced resource utilization**, ensuring available resources are effectively allocated across different types of initiatives.
  - Including initiatives from different quadrants enables a more comprehensive **risk mitigation strategy**. It ensures that potential risks and dependencies are considered, enabling proactive planning and mitigation measures for successful implementation.
  - Considering initiatives from the "No gainer" quadrant would be inefficient and a waste of resources. These initiatives are **unlikely to yield meaningful results or contribute significantly to the desired outcomes**. Therefore, it is more prudent to focus on initiatives from other quadrants of the prioritization matrix that have a **higher potential for success and positive impact**.
- Define time horizons for the 5 initiatives previously selected ([Template 5. Definition of Time Horizons](#)):
  - Horizon 1: (2024 – 2026): Predominantly initiatives from the “Small quick wins” and “No Brainer” quadrants.
  - Horizon 2: (2027 – 2029): Predominantly initiatives from the “No brainer” and “Big Slow wins” quadrants.
  - Horizon 3: (2030 – onwards): Predominantly “Big slow wins” initiatives.
- Brainstorm on potential steps inherent to each action.

- Identify common themes overlapping steps, and potential dependencies among the suggested steps.
- Redesign the steps considering the points below and create a visual representation to illustrate the sequence of dependencies of the action of each initiative ([Template 6. Action Plan](#)).

The main output of the exercise is the identification of the necessary actions to guarantee the implementation of each initiative.

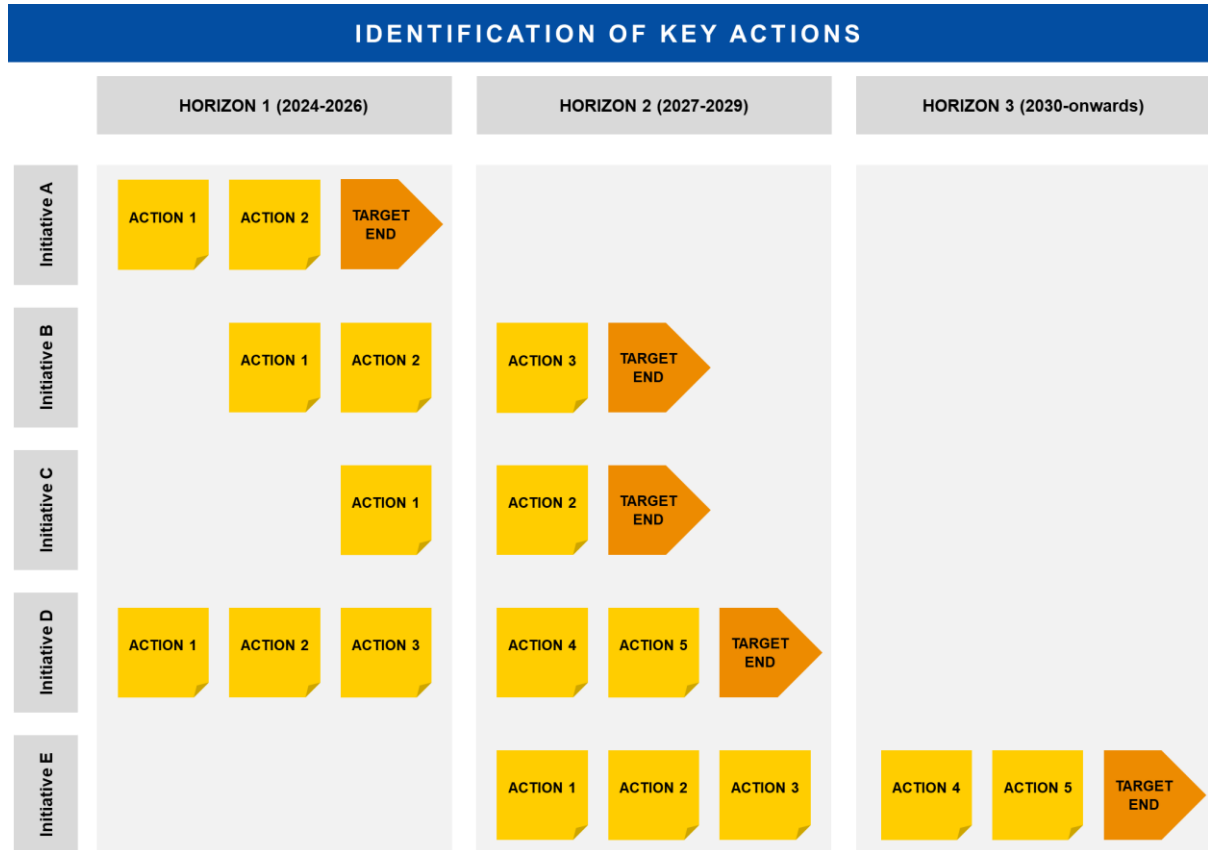


Figure 33. Example of an Action Plan

### Formalising a crisis management plan

Drafting a Crisis Management (CM) Plan aims to help prepare for and effectively respond to various crises. Although the specific content and structure of the crisis management plan will have to be tailored, some key highlights are detailed below:

#### **Scope and objectives of the CM Plan**

Define the scope and objectives of your CM plan and what is considered a crisis situation as well as the scenarios that are covered by the plan.

#### **Activation and Notification Procedures (including Crisis Escalation)**

Clearly define how and when the CM Plan will be activated (i.e. activation criteria). Describe the notification process for alerting internal and external stakeholders.

#### **Crisis Management Governance Structure**

Outline the crisis response governance structure and related roles and responsibilities. This may include:



- Crisis management team members with their roles and responsibilities (crisis coordinator, communication lead, etc.).
- Working/crisis groups, their responsibilities and team members.
- Overview of multi-level (national, regional, local) crisis coordination structures.
- Chain of command and communication flowcharts.

### ***Crisis response actions***

- For each crisis scenario, outline specific step-by-step response actions, in line with severity:
  - Identify actions to accomplish within the first hours-days-weeks of the crisis.
  - Prioritise actions, define an allotted timeframe for completion and appoint responsible owners.
- Describe all predefined policies and measures related to the crisis scenario, the activation criteria, and steps to take to activate them.
- Refer to the activation of related plans and procedures like communication plans, evacuation & shelter plans, safety protocols, assembly points, medical response, and coordination procedures with local authorities.

### ***Crisis recovery actions***

Plan for the recovery phase, including strategies to rebuild the destination's reputation, attract tourists back, and support affected businesses.

### ***Deactivation and Notification Procedures***

Clearly define how and when the CM Plan will be deactivated. Describe the notification process for stakeholders.

*What can be included in the annex of a crisis management plan?*

### ***Detailed Resources Repository***

Detail how resources, both human and material, will be allocated during the crisis (i.e., resource management includes medical supplies, search and rescue teams, emergency funding). Ensure that emergency resources and facilities are readily available, well-maintained, and well-informed.

### ***Crisis Communication Plan***

- List the internal and external stakeholders and information needs.
- Document the protocols for internal and external communication and the media.
- Prepare pre-approved crisis messages and customise them depending on the crisis scenarios.
- Define the most appropriate communication channel to disseminate information during a crisis.

- Address press releases and media queries via a designated spokesperson.
- Monitor social media activities throughout the crisis lifecycle.

**Checklist that covers the most important topics destinations should look into to be better prepared to manage and mitigate a crisis event:**

- Identify and evaluate risks related to potential crises.
- Conduct training for crisis management and preparedness.
- Outline clear crisis management structures with defined roles and responsibilities.
- Define clear communication and coordination channels with the different stakeholders during a crisis event.
- Establish a system for early identification of crises and monitor their evolution and development.
- Reinforce the data sources and processing capabilities needed for informed decision-making.
- Define a set of policies/measures to activate when a crisis hits.
- Document a crisis management plan and the procedures in place.

## Annex

## a. Selected Service Beneficiaries

Table 16. Selected Service Beneficiaries

Service Beneficiary	Country	Level	Mandate
Tourismusverband Linz	Austria	Local	Promotional
Ministry of Tourism of the Republic of Bulgaria	Bulgaria	National	Legislative
Croatian National Tourist Board	Croatia	National	Operational
City of Dubrovnik	Croatia	Local	Operational
Pafos Regional Board of Tourism	Cyprus	Regional	Operational
Visit Finland	Finland	National	Operational
City of Helsinki	Finland	Local	Operational
Visit Kristinestad	Finland	Local	Promotional
Atout France	France	National	Operational
Provence-Alpes-Côte d'Azur Tourism Board	France	Regional	Promotional
Winterberg Touristik und Wirtschaft GmbH	Germany	Regional	Promotional
Rheinland-Pfalz Tourismus GmbH	Germany	Regional	Promotional
Ahrtal-Tourismus Bad Neuenahr-Ahrweiler e.V.	Germany	Regional	Operational
Tourism Office of the Municipality of Katerini	Greece	Local	Promotional
Greek Ministry of Tourism	Greece	National	Legislative
Greek National Tourism Organisation	Greece	National	Operational
Destination Organization of Heraklion - Crete	Greece	Local	Operational
Around Rome DMO	Italy	Regional	Operational
DMO Terre di Otium - Associazione culturale 'Tivoli e la Valle dell'Aniene'	Italy	Regional	Operational
Azienda Promozione Turismo Regione Emilia-Romagna	Italy	Regional	Promotional
DMO Provincia di Latina e dei Monti Lepini	Italy	Regional	Promotional
Latgale Region Tourism Association	Latvia	Regional	Operational
Investment and Development Agency of Latvia	Latvia	National	Operational
Lithuania Ministry of the Economy and Innovation	Lithuania	National	Legislative
National tourism development agency "Lithuania Travel"	Lithuania	National	Operational
Malta National Tourism Authority	Malta	National	Operational
Montenegro National Tourism Organisation	Montenegro	National	Legislative
Wielkopolska Tourism Organisation	Poland	Regional	Promotional

## Crisis Management and Governance in Tourism

Service Beneficiary	Country	Level	Mandate
Poznan Tourism Organisation	Poland	Local	Operational
Turismo do Algarve	Portugal	Regional	Operational
Direção Regional do Turismo da Madeira	Portugal	Regional	Legislative
Azores DMO	Portugal	Regional	Operational
Turismo de Portugal I.P.	Portugal	National	Operational
Turismo do Alentejo ERT	Portugal	Regional	Operational
Turismo do Porto e Norte de Portugal, E.R.	Portugal	Regional	Operational
Asociația Colinele Transilvanie	Romania	Regional	Operational
Timis County Council	Romania	Regional	Operational
Region High Tatras Tourist Board	Slovakia	Regional	Promotional
Central Slovakia Tourist Board	Slovakia	Regional	Operational
Visit Košice	Slovakia	Local	Promotional
Municipality of Postojna	Slovenia	Local	Operational
ZPTM Brežice	Slovenia	Local	Operational
Zavod za turizem in šport Kamnik	Slovenia	Regional	Promotional
Šaleška Valley Tourist Board	Slovenia	Regional	Promotional
KŠTM Sevnica	Slovenia	Local	Operational
SPET, Turismo de Tenerife, S.A.	Spain	Regional	Operational
Municipality of Muro	Spain	Local	Operational
Promoción Exterior de Lanzarote	Spain	Regional	Promotional
Patronat de Turisme Costa Brava	Spain	Regional	Promotional
European Tourism Association	Belgium	European	Industry Association
European Exhibition Industry Alliance (EMECA and UFI)	Belgium	European	Industry Association
European Federation of Campingsite Organisations and Holiday Park Associations	France	European	Industry Association
MPI Belgium-Luxembourg Chapter	Belgium & Luxembourg	European	Industry Association
X23	Italy	European	Industry Association

## b. Impacts of crisis events that have affected the EU tourism ecosystem

### PORTUGAL WILDFIRES 2017

**Table 17. Summary – impacts of Portugal Wildfires 2017 crisis event**

Characterisation of the crisis event – PORTUGAL WILDFIRES 2017	
Indicator/Variable	Quantitative impact
<b>Overview</b>	<p>On 17 June 2017, a wildfire started in the municipality of Pedrógão Grande and spread to other neighbouring municipalities.</p> <p>On 15 October, after the so-called critical fire season, there were more than 500 fires affecting 27 municipalities in the Centre Region of Portugal.</p>
<b>Burnt area</b>	A total of 539,921 ha burnt in 2017.
<b>Causalities/Injuries</b>	<p>17 June 2017: 64 deaths, more than 250 injuries.</p> <p>15 October 2017: 45 deaths, around 70 injuries.</p>
<b>Direct impact on the population</b>	<p>17 June 2017: 500 homes (169 of which were permanent homes), nearly 50 companies and 372 jobs.</p> <p>15 October 2017: 800 permanent homes, almost 500 businesses.</p>
<b>Economic impact</b>	17 June 2017: €500,000,000 - €303,523,486 went to cover investment on preventive measures and economic recovery, and €193,289,791 to cover for immediate damage (e.g., private housing, the forest, economic activities, agriculture, municipal infrastructure and equipment, the national road network and civil protection).
<b>Impact on the Tourism ecosystem</b>	<p><b>Infrastructure:</b> 15 October 2017 registered the destruction of 39 hotels &amp; similar establishments, 2 restaurants, 5 local activities companies and networks of walking &amp; cycling trails.</p> <p><b>Trips cancellation:</b> In the week of 15 October 2017, 77% of the bookings in the municipalities affected by the fires were cancelled or postponed.</p> <p><b>Nights spent:</b> +15% in 2017 compared to the previous year (more than 752 thousand overnight stays).</p> <p><b>Total income:</b> +20% in 2017 compared to the previous year (€44,610 increase).</p>

## ICELAND VOLCANIC PLUME 2010

Table 18. Summary – impacts of Iceland Volcanic Plume 2010 crisis event

Characterisation of the crisis event – ICELAND VOLCANIC PLUME 2010	
Indicator/Variable	Quantitative impact
Overview	In April 2010, Eyjafjallajökull, a volcano in southern Iceland, began to expel ash into the atmosphere which lasted from 14 April until 23 May.
Economic impact	Between <b>€1.5 billion and €2.5 billion</b> on the aviation industry and tour operators.
Impact on the Tourism ecosystem	<ul style="list-style-type: none"> <li>• During the days of the eruption and in the days that followed, there was a reduction of <b>2% in the number of nights spent (-2,226) in April 2010</b>, comparing to March (previous years registered an increase from March to April).</li> <li>• The growth trend observed in the total arrivals of 2010 was interrupted with the referred eruption. In January the growth was 5%, in February 8%, in March 18% and in <b>April a reduction of 5%</b> in arrivals.</li> </ul> <p>More than <b>100,000 flights were cancelled</b> during the volcanic ash crisis, affecting <b>10 million passenger journeys</b>, with an estimated <b>economic loss for the aviation sector of EUR 2.7 billion</b>.</p>

## COVID-19 PANDEMIC

Table 19. Summary – impacts of COVID-19 pandemic crisis event

Characterisation of the crisis event – COVID-19 PANDEMIC	
Indicator/Variable	Quantitative impact
Overview	The COVID-19 pandemic caused an unprecedented disruption to tourism, with a massive fall of international demand amid widespread lockdowns and travel restrictions put in place by countries to contain the spread of the virus. Tourism was one of the first sectors to be impacted, as measures introduced to contain the virus led to a near-complete cessation of tourism activities around the world.
Economic impact	Travel and tourism's contribution to overall GDP in Europe dropped from a 9.5% share in 2019 to 4.9% in 2020. There was a decline of roughly 70% in revenues in 2020.
Impact on the Tourism ecosystem	
Cross-sector	<ul style="list-style-type: none"> <li>• <b>Arrivals in 2020 corresponded to 46% of the previous year</b> (-550 million arrivals). 2021 was slightly better (+27%). 2022 registered a significant recovery, reaching 91% of 2019's total arrivals.</li> <li>• <b>Decline of 72% in foreign arrivals</b> in 2020.</li> <li>• In 2020, there were <b>-63% business trips</b>. This number slightly increased in 2021 (+20% vs. 2020). The recovery accelerated in 2022 (+68% vs. 2021). Leisure visitor arrivals suffered a similar impact, but had a much faster recovery, surpassing pre-pandemic levels in 2022 (+0.1%).</li> <li>• <b>1.5 billion less nights spent in EU tourist accommodations in 2020</b> (-51% vs. 2019). The accommodation sector in the EU started its recovery in 2021 (+29% nights spent). In 2022, it reached 95% of 2019's figures.</li> </ul> <p>EU Residents spent <b>€261 billion less on tourism trips in 2020</b>. In 2021, there was an increase of €73 billion (corresponding to 61% of pre-pandemic levels).</p>

Characterisation of the crisis event – COVID-19 PANDEMIC	
<b>Accommodation</b>	<ul style="list-style-type: none"> <li>• <b>Net occupancy rate in hotels</b> in the EU in 2020 was <b>37.9%</b> (-44.1% vs. 2019). In 2021, there was a slight increase to 45.0%.</li> <li>• The <b>Average Daily Room Rate (ADR)</b> was <b>€93.34</b> in 2020 (-18.2% vs. 2019).</li> <li>• <b>-62.5% in revenue per available room (RevPAR)</b>, reaching the lowest amount of €30.86 in 2020.</li> <li>• The <b>value added at factor cost decreased more than 50% in 2020</b>.</li> </ul> <p>The sector in the EU was <b>employing 2.3 million employees</b> in Q4 2019. This number was 23% lower in the homologous period of 2020, corresponding to <b>1.8 million registered employees</b>. Q4 2021 presented a slight increase (+9% vs. 2020).</p>
<b>Food and beverage service activities</b>	<ul style="list-style-type: none"> <li>• <b>Drop in revenues of 33%</b> in 2020.</li> <li>• The <b>number of employees in 2020 was 13% lower</b> than the number of employees in 2019.</li> <li>• The <b>number of enterprises decreased 3%</b> in 2020 (-41,000 enterprises).</li> </ul> <p>In 2020, the <b>number of registrations dropped to the minimum value registered</b> (-19% compared to 2019). Registrations in subsequent years underwent steady growth of 4%, in both 2021 and 2022. The number of bankruptcies decreased in 2020 (due to the financial support given to companies). This changed in 2021 (+22% of bankruptcies compared to the previous year), reaching a maximum in 2022.</p>
<b>Air transport</b>	<ul style="list-style-type: none"> <li>• <b>Scheduled flight capacity declined by 65%</b> in the first 6 months of 2020.</li> <li>• The total <b>number of air passengers carried decreased by 60%</b> in 2020 (-302 million passengers vs. 2019). 2021 registered 57% of the 2019 total.</li> <li>• The overall <b>turnover in 2020 decreased by 53%</b> compared to 2019.</li> <li>• <b>€22.6 billion net losses for airlines, €33.6 billion revenue losses for airports and €4.8 billion in-year revenue losses for air navigation service providers</b>.</li> <li>• Leading aviation groups <b>reduced their daily average flights between 53% and 67%</b> in 2020.</li> </ul> <p>The <b>number of persons employed</b> in the sector <b>declined 9%</b> in Q4 2020 compared to Q4 2019.</p>
<b>Water transport</b>	<ul style="list-style-type: none"> <li>• In Q2 2020 cruise ship activity <b>dropped by more than 90% and over 90% of the fleet was idle</b>.</li> <li>• <b>-85% of European cruise ship calls in May and June 2020</b>, compared to 2019.</li> <li>• <b>-45% in 2020 of passengers embarked and disembarked</b> in all ports of the EU, compared to 2019.</li> </ul> <p>CLIA estimates the <b>economic impact at USD 154 billion in 2020 and USD 75 billion in 2021</b>.</p>
<b>Land transport and transport via pipelines</b>	<ul style="list-style-type: none"> <li>• Railways across the EU <b>lost €26 billion in revenue</b> in 2020.</li> </ul> <p>The number of <b>international rail passengers in 2020 was at least half of 2019's total passengers</b> in all the 27 EU Member States.</p>
<b>Travel agency, tour operators and other reservation and related activities</b>	<ul style="list-style-type: none"> <li>• The drop in overall <b>turnover was almost 70%</b> in 2020 in comparison to 2019.</li> <li>• The <b>number of employees</b> in the sector registered a <b>decline of 18%</b> in 2020.</li> </ul> <p>The reduction in the <b>number of enterprises was 10% in 2020</b> in comparison to 2019 (-12,000 enterprises).</p>
<b>Office administrative, office support and other business support activities</b>	<ul style="list-style-type: none"> <li>• <b>3,300 exhibitions cancelled</b> or postponed.</li> <li>• <b>€39 billion loss in sales</b> for exhibiting companies and <b>€124.9 billion of economic losses</b>.</li> <li>• In terms of employment, more than <b>1.2 million jobs were affected</b>.</li> </ul> <p>In Europe, the <b>exhibition sector decreased by 68%</b> in 2020.</p>

Characterisation of the crisis event – COVID-19 PANDEMIC	
<b>Creative, arts and entertainment activities</b>	<ul style="list-style-type: none"> <li>In 2020, <b>-31% in revenue was registered</b> (performing arts - 90% decline - and music events - 76% decline - were the most affected).</li> <li><b>78% less live music performances, 1.9 million less artist performances</b> and a <b>decline of, at least, €730 million spent on artists</b> in 2020.</li> </ul> <p><b>Decline of 66% in venues and clubs' total income</b> (€3.1 billion less in overall income).</p>
<b>Libraries, archives, museums and other cultural activities</b>	<ul style="list-style-type: none"> <li>5 out of 10 museums reported a <b>drop between 25-75% of visitors</b>, while 2 in 10 museums even reported <b>more than 75% less</b> visitors.</li> </ul> <p>In terms of income loss, <b>75% of the museums reported an income loss between €1,000 to €30,000 per week</b>.</p>
<b>Gambling and betting activities</b>	<p>Europe's total gambling market revenue in 2020 was worth <b>€81.1 billion in gross gaming revenue</b> (-20% vs. 2019). This <b>increased 8%</b> in 2021, <b>reaching a total of €87.2 billion</b>.</p>
<b>Sports activities and amusement and recreational activities</b>	<ul style="list-style-type: none"> <li><b>15% loss</b> (or €47 million) <b>of direct sports-related GDP</b>.</li> <li><b>Disneyland Paris</b> reported a <b>73% decrease in attendance</b> in 2020 (7.13 million visitors less compared to 2019). In 2020, the attendance numbers of the park underwent an increase of 34% compared to the previous year (-64% vs. 2019).</li> </ul> <p><b>Europa-Park</b> registered a drop of <b>57% in attendance numbers</b> in 2020 (-3.25 million visitors). An increase of 20% was recorded in 2021 compared to 2020, but still far from the 2019 figures (2.75 million visitors less).</p>

## UKRAINE WAR

Table 20. Summary – impacts of Ukraine War crisis event

Characterisation of the crisis event – UKRAINE WAR	
Indicator/Variable	Quantitative impact
<b>Overview</b>	<p>Russia's invasion of Ukraine in February 2022 marked a dramatic escalation of the eight-year-old conflict that began with Russia's annexation of Crimea. It signified a historic turning point for European security.</p>
<b>Overall economic impacts</b>	<p><b>Tourism loss</b></p> <ul style="list-style-type: none"> <li>It is estimated that the conflict has translated into a loss of US\$14 billion in tourism receipts globally in 2022.</li> </ul> <p><b>Inflation crisis</b></p> <ul style="list-style-type: none"> <li>Higher oil prices and transportation costs make air travel and package holidays more expensive.</li> <li>Jet fuel prices are now more than 80% higher than a year ago.</li> <li>The closure of Ukrainian and Russian airspace has led to the rerouting of flights, making them more expensive and increasing pollution.</li> </ul> <p>Higher interest rates and operational costs imply greater pressure on SMEs.</p>
<b>Impacts for Europe</b>	<ul style="list-style-type: none"> <li>Air travel and accommodation searches and bookings showed a slowdown in demand the week after the invasion but started to rebound in mid-March.</li> </ul> <p>The destinations most impacted so far (aside from Russia and Ukraine) are the Republic of Moldova with a 69% drop in flights since 24 February 2022 (compared to 2019 figures), Slovenia (-42%), Latvia (-38%) and Finland (-36%).</p>
<b>National impacts for Ukraine</b>	<ul style="list-style-type: none"> <li>Overall tourism revenue decreased 30% in 2022, compared to the previous year (the drop was not so significant since Ukraine still has domestic tourism and a considerable flow of international visitors).</li> </ul> <p>Domestic tourism is at around 50% of 2021 levels (which was the best in terms of domestic tourism as Ukraine made a large effort to attract domestic tourists).</p>



## PARIS ATTACKS 2015

Table 21. Summary – impacts of Paris Attacks 2015 crisis event

Characterisation of the crisis event – PARIS ATTACKS 2015	
Indicator/Variable	Quantitative impact
<b>Overview</b>	On the Friday night of 13 November 2015, several terrorist attacks were carried out in the city of Paris, at 3 different locations (Stade de France, a restaurant and at a concert in Bataclan Theatre).
<b>Causalities/Injuries</b>	130 fatalities, which were followed by weeks of lockdown and months of security and freedom-restricting measures.
<b>Overall economic impact</b>	A loss greater than €800 million for the French economy in tourist-related revenue and of €1 billion in the European tourism ecosystem was recorded during the first 6 months of 2016.
Impact on the Tourism ecosystem	
<b>Accommodation</b>	<p><b>Occupancy rate:</b> fell by 20.8 and 23.1 percentage points on the nights of Saturday and Sunday.</p> <p><b>RevPAR:</b> dropped 21.1% on Saturday and 28.5% on Sunday.</p> <p><b>Nights spent:</b></p> <ul style="list-style-type: none"> <li>○ <b>France:</b> the two last months of 2015 registered -3% of nights spent (over 1 million nights), compared to 2014. The impact continued during the first ten months of 2016, resulting in a decrease of around 8.8 million nights, compared with 2015 (-2%).</li> <li>○ <b>Paris:</b> -7% nights spent (5.6 million less) in 2016 compared to 2015.</li> </ul> <p><b>Arrivals:</b></p> <ul style="list-style-type: none"> <li>○ <b>France:</b> a drop of around 432,000 arrivals was registered between November and December 2015, compared to the homologous period. In 2016 there was a decrease of 0.2% (254.205 arrivals), compared to 2015.</li> </ul> <p><b>Paris:</b> the number of arrivals registered a fall of 4% in 2016, compared to the previous year (-1.5 million arrivals).</p>
<b>Libraries, archives, museums and other cultural activities</b>	<b>4% decline in the number of museum visitors in Paris, in 2015.</b> This decline was accentuated in 2016 (-14% vs. 2014), followed by a recovery in the following years.
<b>Air transport</b>	The months of November and December 2015 showed, respectively, a <b>drop of almost 60 thousand and 86 thousand air passenger arrivals</b> to the main airports of Paris, compared to the homologous period of 2014 (-4%).

## GLOBAL FINANCIAL CRISIS 2008-2009

Table 22. Summary – impacts of global financial crisis 2008-2009 event

Characterisation of the crisis event – GLOBAL FINANCIAL CRISIS 2008-2009	
Indicator/Variable	Quantitative impact
<b>Overview</b>	The Global Financial Crisis 2008-2009 implied the deepest economic recession since the Great Depression in the 1930's. There were several impacts at a global level in various sectors of activity, but one of the most affected was the Tourism sector.
<b>Impacts on stocks</b>	Airline stocks declined 68%, and hotel, resorts and cruise liner shares fell up to 74%.
Impact on the Tourism ecosystem	
<b>Accommodation</b>	<b>Nights spent:</b> reduction of almost 105 million (-5%) nights spent in 2009 compared to the previous year. <b>Arrivals:</b> reduction of more than 33 million arrivals in 2009 (-5% compared to the previous year). <b>Turnover:</b> drop from 88.0 in 2008 to 81.6 in 2009 (-7%).
<b>Food and beverage service activities</b>	<b>Turnover:</b> drop from 89.2 in 2008 to 87.4 in 2009 (-2%).
<b>Air transport</b>	<b>Passengers carried:</b> reduction of more than 38 million (-6%) passengers transported in EU countries in 2009. In 2010, there was a recovery of 13.6 million passengers (+2%), but still below pre-crisis levels (2008). <b>Turnover:</b> drop in turnover from 91.2 in 2008 to 82.4 in 2009 (-10%).
<b>Travel agency, tour operators and other reservation and related activities</b>	<b>Turnover:</b> drop from 99.2 in 2008 to 87.0 in 2009 (-12%).
<b>Libraries, archives, museums and other cultural activities</b>	<b>Turnover:</b> drop of more than 3 million museum visitors in 2008 compared to the previous year (-5%).

## COSTA CONCORDIA 2012

Table 23. Summary – impacts of Costa Concordia 2012 crisis event

Characterisation of the crisis event – COSTA CONCORDIA 2012	
Indicator/Variable	Quantitative impact
<b>Overview</b>	On 13 January 2012, the Italian cruise liner Costa Concordia sank off Isola del Giglio, Italy. The Concordia was carrying, at the time of the disaster, 3,206 passengers and 1,023 crew members, from about 70 different countries.
<b>Causalities/Injuries</b>	More than 4,200 people were rescued and 32 people died.
<b>Impact on the Tourism ecosystem</b>	<p><b>Cross-sector:</b> positive effect for Giglio Island following the Costa Concordia event: increase in the number of tourists (with many wanting to photograph the disaster site) and hotel bookings. This increase was also boosted by tourism promotion initiatives. The increasing number of tourists led the Giglio authorities to establish an entry fee (€1.5).</p> <p><b>Cruise industry:</b> the accident provoked greater scrutiny on the cruise liner industry by regulatory agencies, such as IMO, flag and port state regulators and legislative bodies. EMSA conducted a damage stability study focusing on passenger ships. Amendments were made to the SOLAS Convention that raise the 'required index R', damage stability requirement, representing the ship's capability to remain stable and afloat in the event of flooding after a collision.</p>

## c. Key challenges and barriers recognised for different governance models

**Table 24. Summary table of the main challenges and key barriers considering the different actors of the tourism ecosystem (not exhaustive)**

Type of Organisation	Key Challenges and Barriers
EU Level	<ul style="list-style-type: none"> <li>• Tourism policies and regulations are the responsibility of individual Member States, and in some cases they are managed at regional and local level. This limits the EU sphere of action since key decision-making for developing tourism is located at national and, sometimes, regional and local levels.</li> <li>• Different priorities amongst the 27 Member States, that may result in very different approaches to managing tourism and to prepare for and respond to crisis events.</li> <li>• Various DGs with interests over tourism (DG-GROW, AGRI, CONNECT, EAC, MARE, REGIO...), thus increasing coordination challenges.</li> <li>• Lack of an EU Tourism Agency focused on coordinating tourism development efforts with the different Member States and tourism ecosystem, and which could create a unified voice to be represented in different forums.</li> <li>• Fragmented sector and multitude of different ecosystem sectors and stakeholders.</li> </ul>
National Level Tourism Organisations (NTAs and NTOs)	<ul style="list-style-type: none"> <li>• Lack of strategic alignment with overarching national strategy. Tourism planning, including crisis management, is not well-integrated into broader planning efforts.</li> <li>• Political instability resulting from frequent changes in government, coupled with varying governmental views on the tourism.</li> <li>• Tourism does not have specific crisis management mechanisms and it lacks standardised risk assessment frameworks.</li> <li>• Tourism does not always have a seat in crisis management forums. It is challenging to establish the necessary coordination with other parts of government with interest or influence over tourism.</li> <li>• Lack of standardised risk assessment frameworks and crisis response mechanisms.</li> <li>• Fragmented sector and multitude of different ecosystem sectors and stakeholders, with predominance of SMEs, making it difficult to align the interests of the public and private sectors.</li> <li>• Limited mandate and narrow scope of NTOs to effectively support the tourism ecosystem in various areas, such as involvement in policy design, technical and financial support, training and data collection and insights.</li> <li>• Absence of crisis management plans to provide clear guidelines and governance structures. Unclear roles and responsibilities of the organisations managing tourism in the destination at different levels.</li> <li>• Lack of access to timely and granular data.</li> </ul>

	<ul style="list-style-type: none"> <li>• Lack of advanced data collection and analysis systems and open data platforms.</li> <li>• Established communication channels are insufficient to share and disseminate information across all levels of the destination's tourism ecosystem, to businesses, tourists and residents.</li> </ul>
<p style="text-align: center;">Regional and Local Tourism Organisations (Authorities, DMOs, Municipalities)</p>	<ul style="list-style-type: none"> <li>• Limited mandate and narrow scope of regional DMOs to effectively support the tourism ecosystem in various areas, such as technical and financial support, training, policy implementation.</li> <li>• Unclear roles and responsibilities of the organisations managing tourism in the destination at different levels and duplication of efforts at different levels.</li> <li>• Alignment with overarching national tourism strategies, with other adjacent regional strategies and with the overarching regional and local strategies.</li> <li>• Crisis management is not a priority area.</li> <li>• Lack of technical and financial resources to develop crisis management preparedness.</li> <li>• Labour shortages and lack of expertise and training in crisis management.</li> <li>• Lack of easy access to timely and granular data.</li> <li>• Lack of skills and awareness to make use of data for decision-making and crisis preparedness.</li> <li>• Ongoing recovery from recent crises.</li> </ul>
<p style="text-align: center;">Industry</p>	<ul style="list-style-type: none"> <li>• Policies and regulation not always adequately tailored to support tourism development and resilience building.</li> <li>• Lack of targeted support to SME, including the necessary tools, frameworks, and financial resources for these smaller organisations to develop their resilience.</li> <li>• Lack of technical and financial resources to build resilience and crisis preparedness.</li> <li>• Lack of easy access to timely and granular data.</li> <li>• Lack of training and expertise in crisis preparedness and management.</li> <li>• Labour shortages.</li> <li>• Bureaucracy and institutional inertia.</li> <li>• Difficult coordination with the public sector.</li> <li>• Ongoing recovery from recent crises.</li> </ul>

## d. Coordination required for different types of crisis events

Table 25. Example of coordination required for different types of crisis events

Type of Organisation	Crisis event				
	Extreme natural events	Epidemics & outbreak of diseases	War/ Terrorism	Cyber attacks	Financial & economic crisis
NTA	<p><b>Horizontal:</b> Ministry of the Environment (or similar); Ministry of Finance; Ministry of Infrastructure</p> <p><b>Vertical:</b> NTO</p> <p>EU Level (if impacts spread across national borders)</p>	<p><b>Horizontal:</b> Ministry of Health (or similar); Ministry of Finance</p> <p><b>Vertical:</b> NTO</p> <p>EU Level (if impacts spread across national borders)</p>	<p><b>Horizontal:</b> Ministry of Defence; Ministry of National Security/Interior; Ministry of International Affairs; Embassies and Consulates</p> <p><b>Vertical:</b> NTO</p> <p>EU Level (if impacts spread across national borders)</p>	<p><b>Horizontal:</b> Ministry of the Interior/National Security; Ministry of Communications</p> <p><b>Vertical:</b> NTO</p> <p>EU Level (if impacts spread across national borders)</p>	<p><b>Horizontal:</b> Ministry of the Economy; Ministry of Finance; Ministry of Labour; Central Bank</p> <p><b>Vertical:</b> NTO</p> <p>EU Level (if impacts spread across national borders)</p>
NTO	<p><b>Horizontal:</b> Civil Protection</p> <p><b>Vertical:</b> NTAs; Regional and Local DMOs</p> <p><b>Sectoral:</b> Tourism ecosystem professional associations</p>	<p><b>Horizontal:</b> National Health Authority; Civil Protection</p> <p><b>Vertical:</b> NTAs; Regional and Local DMOs</p> <p><b>Sectoral:</b> Tourism ecosystem professional associations</p>	<p><b>Horizontal:</b> National Security Agencies; Civil Protection</p> <p><b>Vertical:</b> NTAs; Regional and Local DMOs</p> <p><b>Sectoral:</b> Tourism ecosystem professional associations</p>	<p><b>Horizontal:</b> National Cybersecurity Authority; Technological Providers</p> <p><b>Vertical:</b> NTAs; Regional and Local DMOs</p> <p><b>Sectoral:</b> Tourism ecosystem professional associations</p>	<p><b>Vertical:</b> NTAs; Regional and Local DMOs</p> <p><b>Sectoral:</b> Tourism ecosystem professional associations, Trade Unions</p>

<p>Regional &amp; Local Tourism Authorities</p>	<p><b>Horizontal:</b> Regional government, Municipalities, local response and emergency organisations (emergency medical services, fire services, local civil protection, hospitals), utility services</p> <p><b>Vertical:</b> NTOs</p> <p><b>Sectoral:</b> Regional and local tourism professional associations and key tourism companies</p>	<p><b>Horizontal:</b> Regional government, Municipalities, local response and emergency organisations (local health authority, local civil protection)</p> <p><b>Vertical:</b> NTOs</p> <p><b>Sectoral:</b> Regional and local tourism professional associations and key tourism companies</p>	<p><b>Horizontal:</b> Regional government, Municipalities, local response, and emergency organisations (emergency medical services, fire services, police, local civil protection, hospitals), utility services</p> <p><b>Vertical:</b> NTOs</p> <p><b>Sectoral:</b> Regional and local tourism professional associations and key tourism companies</p>	<p><b>Horizontal:</b> Regional government, Municipalities, Technology Providers</p> <p><b>Vertical:</b> NTOs</p> <p><b>Sectoral:</b> Regional and local tourism professional associations and key tourism companies</p>	<p><b>Vertical:</b> NTOs</p> <p><b>Sectoral:</b> Regional and local tourism professional associations and key tourism companies</p>
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## e. Crisis management framework: checklists

### PREPARE STAGE

Table 26. Crisis Management Framework | Checklist - PREPARE STAGE

Key action	Checklist	Apply
<b>I. Measures for the tourism ecosystem</b>		
Develop <b>risk awareness and assessment mechanisms</b>	Perform a <b>SWOT Analysis</b> to identify the strengths and weaknesses, and spot opportunities and threats in the tourism ecosystem.	All
	Conduct a comprehensive <b>Risk Assessment</b> to identify: <ul style="list-style-type: none"> <li>• Potential <b>risks</b> to which your organisation is exposed, and which may threaten its continuity (e.g., natural &amp; environmental disasters, human-made, health-related).</li> <li>• Potential <b>crisis scenarios</b> that could impact the tourism ecosystem.</li> </ul>	All
	Ascertain the <b>impact and likelihood</b> of each of those risks as they materialise.	All
	Engage with relevant tourism <b>stakeholders</b> to collect their <b>concerns</b> and specific <b>needs</b> for the <b>scenarios</b> drawn up.	All
Develop a <b>pre-defined set of policies and/or measures</b> to be activated in crisis events.	Initiate <b>discussions internally</b> around potential sets of policies and/or measures to be activated in times of crisis, based on defined crisis scenarios.	All
	Gather <b>insights</b> and <b>best practices</b> from other key tourism stakeholders.	All
	Identify and formalise the following measures: 1) <b>Financial</b> - to support businesses (guarantee schemes, direct grants and bank loans); 2) <b>Social</b> - to protect jobs (temporary lay-offs, wage compensations, training and learning courses for professionals in the tourism sector and exemptions from paying social security contributions and tax measures); 3) <b>Fiscal</b> - to ease liquidity constraints (temporary VAT exemptions and reductions, tax credits, support in the form of tax deferrals and tax-related liquidity, extensive fiscal measures, and stimulus by introducing flexibility mechanisms in tax payment); 4) <b>Promotional</b> - to keep tourists engaged and stimulate re-opening; 5) <b>Data &amp; Digital</b> - to support decision-making; 6) <b>Health &amp; Safety</b> - to help restore consumer trust and the welfare of tourists/staff.	Legislative
	Set up a <b>public-private emergency fund for tourism businesses</b> .	Legislative
	Develop <b>tailored advisory programs customised to the unique characteristics of SMEs</b> , to increase their resilience and crisis management capabilities.	Legislative Operational
	Identify and formalise the following measures: 1) <b>Marketing &amp; Promotional</b> - to keep tourists and the trade engaged and	Promotional



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	stimulate re-opening; 2) <b>Data &amp; Digital</b> - to support decision-making.	
	Identify and formalise the following measures: 1) <b>Facilitate the support to tourism businesses and their access to financial, social support</b> (with a focus on SMEs); 2) <b>Promotional</b> - to keep tourists engaged and stimulate re-opening; 3) <b>Data &amp; Digital</b> - to support decision-making; 4) <b>Health &amp; Safety</b> - to help restore consumer trust and the welfare of tourists/staff.	Operational
	Identify and formalise the following measures: 1) <b>Financial</b> - to support businesses; 2) <b>Promotional</b> - to keep tourists engaged and stimulate re-opening; 3) <b>Data &amp; Digital</b> - to support decision-making; 4) <b>Health &amp; Safety</b> - to help restore consumer trust and the welfare of tourists/staff.	Industry associations
Develop a tourism-specific crisis management plan.	Develop a ' <b>ready to-be-used</b> ' <b>tourism-specific crisis management plan</b> based on the above pre-defined set of policies and measures, with concrete guidance and key <b>actions</b> to be taken for different crisis scenarios (including roles and responsibilities).	All
	Establish clear and specific <b>activation criteria</b> that trigger the implementation of the crisis management plan (based on the severity and impact of the crisis).	All
	Develop a tiered approach to <b>crisis escalation</b> , categorising crises into different levels of severity with specific responses and communication strategies.	All
Develop and deliver <b>training in crisis management</b> .	Conduct a <b>comprehensive assessment</b> to identify the specific training needs.	All
	Develop a detailed <b>curriculum/training programme</b> and training material.	All
	Implement the training programme across the whole destination/organisation/tourism sector (including new staff) and <b>evaluate</b> its implementation.	All
	Regularly <b>review and update the training programme</b> to align with crisis management best practices and tourism trends.	All
	Create a centralised online hub or resource repository for the staff, tourism organisations, professional associations to access/share training material, guidelines, and best practices related to crisis management.	All
<b>II. Tourism governance structures and processes</b>		
Broaden the scope of action of <b>National Tourism Organisations (NTOs)</b> .	Review <b>regulatory frameworks</b> to broaden the NTOs' mandate and assess their current capabilities.	Legislative
	Review the set of <b>powers</b> , skills, and resources necessary, and governance structures and processes.	Legislative
	Allocate <b>resources</b> and <b>funding</b> for capacity building, while monitoring the progress and impact.	Legislative
	Review <b>regulatory frameworks</b> to broaden DMOs' mandates and assess their current capabilities.	Legislative

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Strengthen the role of <b>Destination Management Organisations (DMOs)</b> .	Review the set of <b>powers</b> , skills, and resources necessary, and governance structures and processes.	Legislative
	Allocate <b>resources</b> and <b>funding</b> for capacity building, while monitoring the progress and impact.	Legislative
Set up a <b>crisis management team</b> .	Define <b>objectives</b> , <b>scope</b> , and desired <b>outcome</b> of <b>crisis management team</b> , including activation procedures.	Promotional Operational Industry associations
	Establish a <b>crisis management team</b> that includes members from the different departments of the organisation.	Promotional Operational Industry associations
	Appoint a <b>crisis management team coordinator</b> who will be responsible for the overall coordination and decision-making process during a crisis.	Promotional Operational Industry associations
	Define and assign the <b>roles and responsibilities</b> to the crisis management team.	Promotional Operational Industry associations
	Define <b>regulations and guidelines</b> for involvement, information and communication, and <b>processes and methods</b> .	Promotional Operational Industry associations
	<b>Identify and engage with tourism ecosystem's relevant organisations</b> , whose decisions influence your organisation in a crisis and/or which are critical to <b>coordinate</b> and create a common approach to crisis management.	Promotional Operational Industry associations
Set up a <b>tourism destination crisis management governance structure</b> .	Define <b>objectives</b> , <b>scope</b> and the desired <b>outcome</b> of <b>crisis management team</b> structure, and <i>ad hoc</i> working groups, including activation procedures.	Legislative
	Identify who are the relevant stakeholders (public and private organisations) to be included in the crisis management team and working groups.	Legislative
	Establish a <b>crisis management team</b> and <b>working groups</b> that include key stakeholders from different organisations, levels, and sectors.	Legislative
	Appoint a <b>crisis management team coordinator</b> who will be responsible for the overall coordination and decision-making process during a crisis.	Legislative
	Define and assign the <b>roles and responsibilities</b> to the crisis management team/working group members within the coordination structure.	Legislative
	Establish the necessary <b>legal and administrative frameworks</b> and the coordination mechanisms.	Legislative
<b>Integrate</b> and/or coordinate the destination's crisis management governance structure within identified existing crisis response mechanisms of key stakeholders such as ministries, public and private authorities (multi-level and inter-ministerial).	Legislative	

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Establish a <b>crisis communication plan</b> .	Designate a <b>team responsible for crisis communication</b> , consisting of representatives from various departments.	All
	Develop <b>pre-approved crisis messages</b> that can be customised for different crisis scenarios.	All
	Develop crisis communication frameworks for different targets/stakeholders: to the trade and tourists (e.g., information about the ongoing situation, travel restrictions) and tourism businesses (e.g., policy communication, support measures).	All
	Utilise <b>multiple communication channels</b> to disseminate information during a crisis (e.g., platforms, official websites, e-mail newsletters, press releases).	All
	Designate a <b>spokesperson to handle media inquiries</b> and to provide accurate information to the media, preventing the spread of misinformation and rumours.	All
<b>III. Key data elements and sources to assess vulnerabilities</b>		
Ensure <b>available and skilled people</b> to conduct data analysis.	Identify the <b>skills and expertise</b> needed.	All
	Define <b>data and information needs</b> to inform decision makers on an operational, tactical, and strategic level.	All
	Invest in <b>training and upskilling</b> the existing team to develop its <b>data analysis capabilities</b> .	All
	Consider hiring (external recruiting) <b>new talents with expertise</b> in data analysis should the current team lack the necessary skills.	All
Develop a <b>process/system/dashboard</b> to monitor and identify crisis events at an early stage.	Develop data monitoring and analysis <b>processes</b> (for risk sensing, monitoring, forecasting and nowcasting).	All
	Engage with key <b>stakeholders</b> to list all data needs and define the relevant <b>indicators</b> based on their needs.	Legislative
	Design, develop and/or acquire <b>data analysis and visualisation systems/dashboards</b> (crisis management dashboards) to process indicator-related data and support decision-making.	All
	Develop <b>mechanisms</b> to collect and <b>integrate</b> both qualitative and quantitative data from <b>private and open sources</b> , such as National Statistics Offices.	All
	Conduct <b>training sessions</b> and webinars to familiarise users with the processes/systems/dashboards.	All
Monitoring Dashboard & Forward-Looking Dashboard is in attachment.		
Establish <b>partnerships with data set providers</b> to access data and market trends.	Perform a <b>cost-benefit analysis</b> to carefully identify the data needs (i.e., type, format, etc.), frequency of data update and in which data sources to invest.	All
	Search for potential <b>data set providers</b> (e.g., governments, research centres, private organisations, etc.) and initiate the first contact.	All
	Sign a <b>data sharing agreement</b> (i.e., outlining the terms and conditions of accessing the data).	All

	Define and agree on the <b>channel/means</b> to access data.	All
Data sources Dashboard is in attachment.		
Create a network of tourism industry stakeholders to assess <b>industry sentiment</b> .	Select <b>participants</b> to establish the <b>network</b> of tourism industry stakeholders.	Legislative
	Develop a framework for <b>data analysis to assess industry sentiment</b> , by putting in place monthly pools with a set of questions that would allow stakeholders to provide their view and concerns regarding the sector.	Legislative
	Carry out <b>social media tracking</b> to analyse consumer behaviour, preferences, and industry sentiment.	All
	Establish a <b>communication channel and information sharing platform</b> for collaboration and knowledge sharing.	Legislative

## RESPOND STAGE

Table 27. Crisis Management Framework | Checklist - RESPOND STAGE

Key action	Checklist	Apply
<b>I. Measures for the tourism ecosystem</b>		
Conduct situational awareness to evaluate the <b>pre-defined set of policies and/or measures</b> .	Get a <b>clear understanding of the current situation</b> (nature of crisis, current and potential future impacts, geographical extent, resources available to address the crisis, immediate priorities and long-term objectives).	All
	Evaluate the <b>relevance and adequacy of each policy and/or measure</b> concerning the potential crisis scenarios the organisation may face.	All
	Identify the most affected tourism ecosystem, understand interdependencies and possible domino effects.	Legislative Operational
Activate the <b>pre-defined set of policies and/or measures</b> .	<b>Mobilise resources and activate the most applicable</b> previously <b>defined and formalised measures</b> (i.e., Financial, Social, Fiscal, Promotional, Data & Digital, Health & Safety) given the crisis circumstances.	All
	Trigger the <b>public-private emergency fund</b> for tourism businesses.	Legislative Operational
	Activate the <b>targeted support programmes</b> to increase SMEs capabilities in the areas of resilience and crisis management.	Legislative Operational
	Activate the necessary processes to provide easy and prompt support to tourism businesses.	Legislative Operational
	Provide access to <b>digital platforms</b> and <b>tools</b> that help SMEs monitor, analyse, and respond to potential risks and crises.	Legislative Operational
Activate a tourism-specific <b>crisis management plan</b> .	Formalise the <b>activation</b> of the crisis management plan and activate the <b>dedicated Crisis Management Team (CMT)</b> .	All
	Ensure that all the <b>roles and responsibilities</b> have been defined and assigned to every CMT team member.	All

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	Ensure that the <b>Crisis Coordinator</b> continuously coordinates the actions taken and decision-making.	All
	Keep all <b>stakeholders informed</b> about the situation, progress, actions taken, and safety measures in place, ensuring transparency in communication.	All
	Continuously <b>monitor the situation and frame the crisis</b> to gauge the effectiveness of the crisis management measures, and adapt if necessary.	All
<b>Advocate and adjust policies and/or measures</b>	Advocate for the industry needs and provide feedback on the impacts of the policies, measures to mitigate the impact of a crisis.	Industry association
	Advocate for the destination needs and provide feedback on the impacts of the policies, measures to mitigate the impact of a crisis.	Promotional Operational
	Analyse and assess the impacts of the pre-defined set of policies and/or measures to mitigate the impacts of crisis events and adjust accordingly.	All
	Prepare clear and comprehensive policy adjustment proposals that outline the proposed changes, rationale, expected outcomes, and benefits.	Legislative
	Continuously assess the impact and effectiveness of the adjusted policies and measures in addressing the crisis.	Legislative
<b>II. Tourism governance structures and processes</b>		
<b>Activate crisis management team and crisis communication plan.</b>	<b>Activate the Crisis Management Team</b> as per the established protocol, ensuring all relevant team members are informed and available to participate.	All
	Activate <b>contingency plans that outline roles, responsibilities, and action</b> at each level during various crisis scenarios.	All
	Review and reinforce the crisis management regulations and guidelines, including <b>communication protocols, reporting mechanisms, and decision-making processes.</b>	All
	Establish <b>clear communication and information flow protocols</b> , ensuring information is shared seamlessly within the organisation and with external stakeholders.	All
	<b>Coordinate with tourism ecosystem's relevant organisations</b> , whose decisions influence the organisation in a crisis, to create a common approach to crisis management.	All
<b>Collaborate with multi-level (national, regional, local) crisis coordination structures.</b>	Activate clear lines of communication between the organisation and national, regional, and local crisis coordination bodies.	Legislative Promotional Operational
	Activate a network of contacts (NTOs, Regional and Local DMOs) to facilitate timely information sharing and collaboration.	Legislative Promotional Operational
	<b>Discuss and agree on strategies</b> that leverage resources from all levels for a cohesive and integrated response.	Legislative Promotional Operational
	Activate <b>contingency plans</b> that outline roles, responsibilities, and action at each level during various crisis scenarios.	Legislative Promotional Operational

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	Guarantee <b>seamless integration</b> between the organisation's crisis management governance structure and the multi-level crisis coordination structure.	Legislative Promotional Operational
Collaborate with <b>inter-ministerial crisis coordination structures</b> .	<b>Establish contact</b> with key personnel within the inter-ministerial crisis coordination structure.	Legislative
	<b>Participate</b> in inter-ministerial crisis coordination meetings or briefings, contributing with relevant insights, data, and resources that support a coordinated response.	Legislative
	<b>Discuss and agree on strategies</b> that leverage resources from multiple ministries for a unified response.	Legislative
	Create <b>joint action plans</b> that outline roles, responsibilities, and specific actions/contributions of each ministry to the overall crisis response.	Legislative
	Guarantee <b>seamless integration</b> between the organisation's crisis management governance structure and the multi-level crisis coordination structure.	Legislative
Collaborate in tourism ecosystem <b>ad hoc crisis groups</b> .	<b>Activate ad hoc groups</b> comprising representatives from various sectors, including hotels, airlines, tour operators, local authorities, and relevant associations.	Legislative Operational Industry associations
	Establish regular <b>communication channels</b> for sharing updates, insights, and emerging challenges.	Legislative Operational Industry associations
	Share <b>real-time information about the crisis impact</b> , response strategies, recovery efforts, and evolving situations.	Legislative Operational Industry associations
	Periodically evaluate the <b>performance of ad hoc crisis groups</b> (including their mandate) and their impact on crisis management.	Legislative Operational Industry associations
	Guarantee <b>seamless integration</b> between the organisation's crisis management governance structure and the multi-level crisis coordination structure.	Legislative Operational Industry associations
<b>III. Key data elements and sources to assess vulnerabilities</b>		
Activate the <b>people/processes /systems/dashboards</b> to monitor the crisis.	Activate data monitoring and analysis processes/systems/dashboards and increase capacity (skilled data analysts) to get the required info.	All
	Confirm the set of <b>key metrics</b> that will help to get a clear understanding of the current situation.	All
	Confirm the set of <b>key indicators</b> and their respective desired outcomes to be able to assess the crisis response at a later stage.	All
	Use insights from <b>external experts</b> , and/or existing dashboards and statistics methods developed by official organisations at national level or European level.	All
	Partner with potential <b>external companies</b> whose core <b>business</b> is to provide data and other related analyses (if required).	All

	Create <b>clear and informative data visualisation</b> , dashboards, and reports to convey situational awareness and findings to support decision-making.	All
Estimate the <b>impact, length and severity</b> of the crisis and <b>develop different scenarios</b> to guide decision makers	Confirm the <b>key metrics</b> that will help measure the impact and severity of the crisis.	All
	Collect <b>data</b> from <b>open</b> (e.g., National Statistics Offices) and/or <b>paid sources</b> (e.g., acquiring databases from establishing partnerships with data providers).	All
	Analyse the <b>characteristics of the crisis</b> (i.e., cause, scope, and potential escalation).	All
	Quantify the <b>potential financial impact</b> incurred during the crisis and estimate its <b>likely duration</b> .	All
	<b>Develop different forward-looking scenarios to support decision-making</b> , based on the acquired information.	All
Continuous <b>monitoring and reporting</b> on the progress of the crisis event through a set of indicators.	Review and improve <b>indicators</b> selection/frequency of update, if necessary, based on the progress of the crisis, to generate <b>actionable</b> data.	All
	Confirm <b>thresholds for each indicator</b> that indicate critical changes in the crisis situation.	All
	Define the <b>frequency of reporting updates</b> (depending on the nature of the crisis) and <b>create a standardised reporting template</b> to ensure consistency.	All
	<b>Transform the analysed data into actionable insights</b> to help provide information for decision-making and guide the crisis management team in formulating effective responses.	All

## RECOVER STAGE

Table 28. Crisis Management Framework | Checklist - RECOVER STAGE

Key action	Checklist	Apply
<b>I. Measures for the tourism ecosystem</b>		
Conduct situational awareness to evaluate the <b>pre- defined set of policies and/or measures</b> .	Get a <b>clear understanding of the current situation</b> .	All
	<b>Declare the end of the crisis</b> if appropriate (but remain vigilant).	All
	Evaluate the <b>relevance and adequacy of each policy and/or measure</b> concerning the return to (new) normal.	All
	<b>Stop, institutionalise, relax</b> the existing measures in line with the evaluation.	All
	<b>Monitor</b> at regular intervals.	All
Discuss and <b>activate</b> the	Initiate discussions internally (i.e., brainstorm sessions) around <b>targeted support</b> per enabler (i.e., Health & Safety, Financial and Fiscal and Promotional) for a faster recovery.	All

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enablers for a faster recovery.	Gather <b>insights</b> from other tourism <b>stakeholders/peer organisations</b> to get inspiration and alignment on best practices.	All
	Implement <b>Health &amp; Safety</b> measures to rebuild consumer trust on travelling and tourism (e.g., certificates, seals).	Legislative Operational Industry association
	Implement <b>Financial and Fiscal</b> measures to continue support and stimulate the recovery of tourism-related businesses, and hence the overall economy.	Legislative Operational
	Focus on <b>Marketing strategies</b> and implement <b>Promotional</b> measures to stimulate travel demand (domestic and foreign) and continue to promote the services provided by tourism-related businesses (e.g., via promotional/marketing campaigns, travel vouchers).	All
	Identify and target <b>new customer segments</b> and markets that could become significant in the recovery phase due to <b>evolving customer and market preferences</b> .	All
	Support the introduction of <b>new products/services to link to market trends</b> .	All
	Set clear <b>KPI's and monitor at regular intervals</b> .	All
Identify and solve <b>bottlenecks</b> for recovery.	Investigate the <b>root causes</b> of each bottleneck, which might involve talking to stakeholders, conducting surveys, analysing data, and studying historical patterns.	All
	Identify the most affected sectors, understand interdependencies and possible bottlenecks that these sectors can cause in the recovery of the ecosystem/destination.	Legislative Operational
	Create a <b>detailed plan</b> with specific actions to address each bottleneck effectively.	All
	Begin <b>implementing</b> the remediation plan, tackling one bottleneck at a time.	All
	Regularly monitor <b>progress</b> and <b>adjust</b> the plan if needed based on real-time feedback.	All
Use the recovery period to <b>identify lessons learned, update the plan and related training material</b> .	Initiate discussions internally & gather feedback for future <b>lessons learned</b> .	All
	Amend/ <b>improve</b> the current <b>crisis management plan and related training material</b> developed as part of the "prepare" stage based on the feedback gathered.	All
	Provide support, <b>guidance and training</b> (including lessons learned) in crisis management & preparedness.	All
	Embrace a <b>culture of continuous learning and improvement</b> in crisis management.	All
	<b>Share guidance material and best practices</b> .	All
Review <b>destination or organisation strategy</b> , focusing on	Understand how the playing field has changed and how it <b>affects the destination or organisation</b> .	All
	<b>Evaluate the existing strategy</b> to identify its strengths, weaknesses, and gaps in addressing the new reality.	All



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resilience building and sustainability.	Conduct <b>risk analyses to identify potential threats and vulnerabilities</b> that the organisation or destination may face in the future.	All
	<b>Update the implemented strategy</b> to cope with the new reality, focusing on resilience building and long-term sustainability.	All
<b>II. Tourism governance structures and processes</b>		
Change from crisis coordination structures to <b>project coordination structures.</b>	<b>Evaluate the current crisis management coordination structures</b> in place, in light of the current situation.	All
	<b>Stop, institutionalise, relax</b> the existing structures in line with the evaluation and establish more appropriate project coordination structures.	All
	Evaluate the timing and frequency of alignment meetings, file documents & reports, ensure clear communication to all stakeholders.	All
Maintain clear communication channels	<b>Evaluate the current communication processes and channels</b> in place, in light of the current situation.	All
	<b>Stop, institutionalise, relax</b> the existing processes and channels in line with the evaluation.	All
	<b>Adjust communication processes and channels</b> to reflect the organisation's recovery priorities and goals.	All
Analyse the recovery efforts and use the <b>lessons learned to improve the crisis management governance structure.</b>	<b>Evaluate the decision-making approaches</b> used during the "respond" stage and their impact on the desired outcome.	All
	Analyse and <b>highlight</b> the <b>coordination structures</b> that had the most significant positive impact on the response and recovery processes.	All
	<b>Engage with key stakeholders</b> , including employees, tourists, suppliers, and locals about their perception of the recovery process.	All
	Adapt/revise the <b>crisis management governance structures</b> accordingly (and document in the crisis management plan).	All
Collaborate through <b>cross-sector partnerships</b> and collective efforts in planning and implementing recovery initiatives.	Initiate or join existing cross-sector <b>partnerships/alliances</b> so that member organisations can benefit from a <b>mutual exchange of information</b> and/or best practices and/or viewpoints and/or tourism insights and/or data at various levels.	All
<b>III. Key data elements and sources to assess vulnerabilities</b>		
Regularly <b>review and update the recovery strategies</b> , based on a set of key indicators.	Continue with the process/system for <b>ongoing data collection and assessment</b> to track the evolving situation and adjust response strategies accordingly.	All
	<b>Continue to collaborate with relevant ministries, organisations, and experts</b> to share data and insights for a comprehensive assessment of the situation, the damage caused, as well as the obstacles to overcome.	All
	Use outcome to <b>allocate resources effectively</b> and prioritise recovery efforts to areas with the most critical needs.	All

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Regularly <b>review and update the recovery strategies</b> , based on a set of key indicators.	<b>Monitor and assess</b> whether the <b>desired outcome</b> was achieved, based on the indicators and KPIs selected as part of the “respond” phase. If not, consider <b>reviewing and updating</b> the recovery strategies.	All
	Should emerging opportunities or challenges be identified, adapt <b>the recovery strategy</b> accordingly.	All
<b>Document the lessons learned</b> based on the impact analysis of the measures applied.	Assess the <b>impact of the measures</b> applied during the response and recovery stages, based on the indicators and KPIs defined in the “respond” phase.	All
	<b>Gather input from all stakeholders</b> on what went well and what could have been done differently.	All
	Summarise the overarching <b>lessons learned</b> from the above impact analysis.	All
Share <b>best practices and lessons learned</b> with other key tourism stakeholders.	Set up <b>communication channels</b> to facilitate the sharing of best practices and lessons learned with the network of tourism industry stakeholders created in the “prepare” stage.	Legislative
	<b>Develop case studies and reports</b> that document successful practices and lessons learned and share it on the communication channel selected (so that destinations and organisations can benefit from a mutual exchange of information).	All
	<b>Conduct webinars or virtual meetings</b> to enable stakeholders from diverse locations to participate and share their experiences.	All
	<b>Based on lessons learned, continue to forge partnerships and alliances</b> with other organisations/industry associations to pool resources and knowledge and prepare for forthcoming crises.	All

## f. Policy Recommendations

### i. Policy recommendations for National/Regional Level

**Ensure a clear governance model for destination management at all relevant levels with well-defined roles and responsibilities for tourism development, resilience building and crisis management**

[Level]	National
[To whom is it addressed]	National Tourism Authorities (NTA), Regional Tourism Authorities (RTA)
[Who should be involved]	National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO)

There is often a **lack of clarity and visibility regarding the roles and responsibilities of the different organisations within the tourism ecosystem**, particularly with overlapping responsibilities among National Tourism Authorities (NTAs), National Tourism Organisations (NTOs), and among regional and local entities (RTAs, regional and local DMOs).

[Why?]

This ambiguity leads to **overlapping responsibilities or grey areas where no single entity is clearly accountable. This is most evident in crisis management**, as it is unclear (duplicity or grey areas without a defined actor responsible) who is responsible for what action at each level. While day-to-day operations may function smoothly despite these uncertainties, the absence of clearly defined roles becomes particularly problematic during crises. The situation worsens when multiple organisations at the same level are involved in managing tourism, leading to confusion and inefficiency.

It is, therefore, important to ensure a clear governance model for destination management and clear roles and responsibilities of the different tourism organisations – NTAs, RTAs, NTOs, Regional and Local DMOs – in tourism development, resilience building and in crisis preparedness and management.

This is an important first step to better destination management and crisis management preparedness. A clear governance structure will contribute to better collaboration and coordination among tourism organisations at different levels. Clear roles and responsibilities will create agility in tourism governance, accountability, and improved crisis response capacity. Each organisation will then understand its place and how to collectively proceed to build resilience, crisis preparedness and management.

[High-level implementation steps and options]

#### *Review Destinations' Management Models*

- Collaborate with the organisations engaged in destination management – NTOs and/or Regional and Local DMOs - to conduct a thorough assessment of the current governance structures. Specifically, to examine the roles and responsibilities of tourism organisations at the national, regional, and local levels.
- Conduct a study to identify areas for tourism governance improvement, namely in the distribution of responsibilities.
- Evaluate the effectiveness of existing structures, policies, and practices.

**Ensure a clear governance model for destination management at all relevant levels with well-defined roles and responsibilities for tourism development, resilience building and crisis management**

*Outline the hierarchical governance structure*

- Illustrate the levels of authority and responsibility at national, regional, and local level.
- Review the decision-making processes, ensuring transparency and efficiency in governance and mitigating existing challenges such as bureaucracy and institutional inertia.

*Ensure roles and responsibilities in tourism development, resilience building, and crisis preparedness and management are clear*

- Outline tourism development, resilience building and crisis preparedness and the management roles of the different organisations.
- Ensure there is clarity and that there is not duplicity of responsibilities and/or grey areas without a defined responsible post.

*Perform Scenario planning exercises*

- Test the clarity of roles and responsibilities with scenarios of typical tourism-related or induced decision-making exercises, identifying any overlapping duties or gaps in accountability.
- Test the established coordination and communication channels.

*Review Legislation and Policy Development*

- If needed, develop and enact legislation and policies to support the governance model changes.

[Time bound]

Short-term

[Effort]

Moderate Effort

**Ensure that there is common coordination mechanism for tourism resilience building and crisis management at the highest administrative level of the country, even if the competences are at regional/local level. It should include policy steering, financial support, skills development, and communication alignment towards international audiences**

[Level]

National

[To whom is it addressed]

National Tourism Authorities (NTA), Regional Tourism Authorities (RTA)

[Who should be involved]

National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO)

**Ensure that there is common coordination mechanism for tourism resilience building and crisis management at the highest administrative level of the country, even if the competences are at regional/local level. It should include policy steering, financial support, skills development, and communication alignment towards international audiences**

The distribution of responsibilities of developing, promoting, and regulating tourism varies across EU countries. It depends on factors such as the system of government, the importance of tourism in the economy or the nature of tourism demand. The best model from an institutional perspective depends on a country's specific context, goals, and priorities, with each approach offering unique advantages.

Nevertheless, **our analysis suggests that NTOs** (or Regional Destination Management Organisations, where regional autonomy exists) - **at the highest administrative level of destinations - with responsibilities encompassing both operational and promotional roles, are better positioned to build resilience and crisis preparedness to effectively support the tourism ecosystem.**

[Why?]

**These organisations with broader responsibilities tend to be more agile and efficient**, as they can manage a wide array of resources and streamline coordination efforts. They can develop deep understanding of the industry's needs, challenges, and opportunities, placing them in a privileged position to **1) help policy makers** to shape better policies/initiatives and **2) support the successful implementation.**

This comprehensive approach allows them to develop and implement long-term strategies more effectively, covering the entire spectrum of destination management. It also eases coordination with only one contact point for operational and promotional tourism development.

Considering the privileged position of **NTOs** (or regional DMOs, where regional autonomy exists) within the ecosystem and the results of our analysis, it would be important to ensure these organisations **have a strong operational and promotional mandate to coordinate key activities in resilience building, crisis preparedness and management.**

[High-level implementation steps and options]

*Ensure the scope of NTOs (or regional DMOs, where regional autonomy exists) includes the following areas*

- **Engagement in policy development:** increasing their collaboration with policy makers (NTAs, RTAs) to ensure that the interests of the tourism ecosystem are well-represented and aligned with broader national goals. This involves 1) constant monitoring of the results of the implementation of policy and 2) constant contact with the industry - to collect feedback and suggest improvements to policy makers.
- **Destination Management & Product Development:** overseeing 1) coordination across different bodies and ensuring synergy in implementing tourism policies; 2) the management and development of
- tourist destinations, including conservation of natural and cultural heritage sites; 3) product development and tourism offers.
- **Financial Support:** managing financial support instruments. Implementing and monitoring funding for regional and local tourism organisations and for companies within the tourism ecosystem. NTOs (or regional DMOs, where regional autonomy exists), by actively participating in the funding process, can play a crucial role in ensuring that the financial resources are distributed efficiently and

Ensure that there is common coordination mechanism for tourism resilience building and crisis management at the highest administrative level of the country, even if the competences are at regional/local level. It should include policy steering, financial support, skills development, and communication alignment towards international audiences

effectively to support the growth and development of tourism destinations and businesses. They should also support the ecosystem by seeking out and applying for other funding opportunities (e.g., EU funding opportunities).

- **Skills development and Training and Education:** Provide support (e.g. information on key skills needs) for training programmes and educational initiatives aimed at improving the skills and knowledge of tourism professionals and at reskilling/upskilling personnel to work in tourism. Collaborate with organisations managing tourism education (vocational schools and higher education).
- **Technical Assistance:** Provide technical assistance for tourism ecosystem actors (local DMOs, tourism businesses) to enhance tourism products and experience, and to follow national/regional strategic objectives for tourism development and crisis management
- **Market Research and Intelligence:** Conduct market research to identify target markets, consumer preferences, and emerging trends in key source markets, from the perspective of the highest strategic level of tourism management. Monitor global tourism trends, competitor destinations, and consumer behaviour to inform about marketing and promotional strategies.
- **International Marketing:** Promote the country or region as a tourist destination through international marketing campaigns, trade shows, and promotional activities, collaborating with the European Travel Commission.

*Formalise NTOs (or regional DMOs, where regional autonomy exists) as the resilience building and crisis management coordinators within the destination geography*

- Formalise the role of NTOs (or regional DMOs, where regional autonomy exists) as coordinators of the efforts to increase the resilience and crisis preparedness of the destination, as well as to coordinate crisis management efforts, especially in crisis events with potential impacts across several local or regional destinations.

*Strengthen NTOs' (or regional DMOs, where regional autonomy exists) internal structure with the following structures focused on crisis management, linked with the horizontal tourism development governance structures*

- **Tourism crisis management committee**, which defines, manages, and monitors resilience building and crisis preparedness activities, including the development and update of the destination crisis management plan. This committee should establish and coordinate necessary collaboration structures with tourism organisations at different levels, relevant governmental agencies, industry associations and other relevant stakeholders to establish robust crisis management frameworks and protocols. They can ensure resilience building and crisis preparedness and that information flows efficiently by fostering partnerships and knowledge-sharing networks, enabling timely decision-making and coordinated responses in times of crisis.
- **Risk assessment & monitoring team**, which can be integrated into the market research and intelligence team, will establish early warning mechanisms and perform risk sensing, monitor, and analyse data to provide insights for the tourism ecosystem and support decision-making.
- **Crisis response task force**, to be activated when a crisis hits, to coordinate the ecosystem crisis management efforts. This team can swiftly transition into response mode, leveraging the committee's

**Ensure that there is common coordination mechanism for tourism resilience building and crisis management at the highest administrative level of the country, even if the competences are at regional/local level. It should include policy steering, financial support, skills development, and communication alignment towards international audiences**

	<p>established networks and resources to provide immediate support to affected stakeholders.</p> <p><i>Assess current capabilities of the NTO (or regional DMOs, where regional autonomy exists) and ensure they are up to date with current challenges</i></p> <ul style="list-style-type: none"> <li>• Review the set of competencies, skills, and resources necessary for personnel supporting tourism at the highest operational destination level.</li> <li>• Allocate resources and funding to build the capacity of the NTOs (or regional DMOs, where regional autonomy exists), considering needs for skills, human resources, technologies, or access to data.</li> <li>• <i>Develop internal procedures and provide training to staff so that they are better equipped to deal with crisis situations.</i></li> </ul> <p><i>Review regulatory frameworks to broaden mandates and ensure agility</i></p> <ul style="list-style-type: none"> <li>• Review the regulatory framework, and if needed, strengthen the role of national/regional tourism organisations with a mandate which provides support to the tourism ecosystem at their level with sufficient administrative autonomy.</li> <li>• Ensure that the legislative framework provides the necessary authority and resources for effective crisis management.</li> <li>• Provide legal and regulatory backing to their activities, secure adequate funding, and ensure the necessary resources and tools.</li> <li>• Support the simplifying of procedures in order to provide agile and flexible ways for these organisations to efficiently adapt to changing circumstances in their operations and how they support the DMOs within their territory.</li> </ul>
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[Time bound]

Short-term

[Effort]

Moderate Effort

**Secure a broad enough mandate for operational actors at regional and local levels (Destination Management Organisations, DMOs) to provide effective support both in normal and crisis situations to tourism ecosystem stakeholders at their levels, including focused policies, financial support, skills development and promotional activities**

[Level]	Regional and Local
[To whom is it addressed]	National Tourism Authorities (NTA), Regional Tourism Authorities (RTA)
[Who should be involved]	National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO)

**Secure a broad enough mandate for operational actors at regional and local levels (Destination Management Organisations, DMOs) to provide effective support both in normal and crisis situations to tourism ecosystem stakeholders at their levels, including focused policies, financial support, skills development and promotional activities**

Regional and local governments play a fundamental role in tourism development and management. The principle of **subsidiarity** should be followed to ensure agile governance, allowing **issues to be resolved at regional or local level whenever possible**. These organisations must be equipped with the necessary tools, knowledge, and resources to effectively **support the tourism stakeholders** that operate at those levels.

[Why?]

Regional and local DMOs can act on several fronts. Their **proximity to the local context** allows them to **coordinate preparedness and response efforts more effectively**. This close understanding of local needs and conditions puts them in a privileged position to implement policies and what is learnt from these experiences, while offering **targeted support to local businesses**.

These organisations are also key in **establishing effective collaborative environments**. They can provide quick and targeted responses during crises, by fostering close relationships and **communication channels** with government, industry, and other stakeholders. Furthermore, their accessibility promotes a more inclusive and participatory approach, enabling stakeholders to reach out and collaborate on solutions.

[High-level implementation steps and options]

*Ensure the scope of regional DMOs to include the following areas*

- **Strategy development:** Develop strategy (including crisis management) for the tourism in the region, ensuring alignment with relevant national strategies, regional strategies and with the different sectors of the tourism ecosystem, taking into consideration territorial specificities.
- **Destination management & product development:** Oversee 1) coordination across different bodies and ensuring synergy in implementing tourism policies; 2) the management and development of tourist destinations, including conservation of natural and cultural heritage sites; 3) product development and tourism offers.
- **Policy implementation:** Enforce national and regional policy and regulations at destination level and monitor and support tourism ecosystem stakeholders in their work towards the policy objectives (e.g. reducing food waste). Provide local/regional policy feedback to support national and regional policy making processes.
- **Technical and financial support:** Provide advice to tourism actors (local DMOs and businesses) on enhancing the tourism product and experience, tourism management and supporting businesses to achieve common goals and address challenges. They should also support the ecosystem actors in making good use of available funding and skills development opportunities.
- **Stakeholder coordination:** Act as a connector between the public authority, private companies, and other relevant entities, promoting collaboration and data sharing among them. Guarantee coordination with the national and regional tourism authorities, regional industry associations and other main tourism stakeholders. Ensure cross-sectoral collaboration, interacting with all relevant sectors and stakeholders, including different actors that have regional mandates (police, fire services, etc.), as well as residents.
- **Data Collection and analysis:** Align with and make use of data platforms and tools provided at national/regional level for the



**Secure a broad enough mandate for operational actors at regional and local levels (Destination Management Organisations, DMOs) to provide effective support both in normal and crisis situations to tourism ecosystem stakeholders at their levels, including focused policies, financial support, skills development and promotional activities**

destination management, complementing nationally available data resources with regional data.

- **Central hub of information:** For regional and local levels, providing relevant information for tourism operators, including reporting on data collected (e.g., monthly tourism performance of the region).
- **Destination promotion:** Promote their respective regions as tourist destinations, following guidance from the highest administrative levels on promotion aimed at different territories (domestically, neighbouring regions/countries, internationally).

*Ensure the scope of action of DMOs at Local level to include the following areas*

- **Strategy development:** Develop a strategy for tourism in the city or municipality, ensuring alignment with regional and national strategies, other relevant regional strategies and with the different sectors of the tourism ecosystem, and considering local specificities.
- **Regulatory:** If foreseen in the country's administrative model, implement relevant tourism administrative tasks at local level, such as monitoring and providing licences for tourism operators and managing support grants for tourism businesses.
- **Policy support:** Monitoring and advising tourism ecosystem stakeholders' activities and needs at the local level, giving feedback and proposals on tourism policy implementation for local and regional tourism authorities.
- **Stakeholder coordination:** Act as a connector between the municipality, private companies, and other relevant entities, promoting collaboration and data sharing among them. They should guarantee coordination with the regional DMO, coordination with municipalities and coordination with main tourism stakeholders. Ensure cross-sectoral collaboration, interacting with all relevant sectors and stakeholders including non-commercial actors that have important local mandates (police, fire services, etc.).
- **Product development and innovation:** Provide advice to businesses on sustainable product development, resilient business strategies, encouraging innovative value creation through cooperation between various components of the tourism industry.
- **Promotion and information for tourists:** Establish local information mechanisms for tourists, material and campaigns to highlight local value propositions and tourism offers, in line with promotion strategies at regional and national levels.

*Strengthen the capacity to play a role in crisis management*

- **Ensure that regional/local DMO representatives are part of the regional/local crisis management approach** for risk sensing, resilience building, and crisis preparedness and management, or if relevant, establish a dedicated tourism crisis management team at regional/local level.
- Review, if necessary, the set of powers, skills, and resources necessary for the DMO personnel to support tourism development and crisis management.
- Develop internal procedures and provide training to staff so that they are better equipped to consider the resilient development of the tourism ecosystem at their level, and to deal with crisis situations.

**Secure a broad enough mandate for operational actors at regional and local levels (Destination Management Organisations, DMOs) to provide effective support both in normal and crisis situations to tourism ecosystem stakeholders at their levels, including focused policies, financial support, skills development and promotional activities**

*Review regulatory frameworks to broaden mandates*

- Review, if necessary, the regulatory framework to strengthen the role of these organisations, increasing their mandate to effectively support the ecosystem.
- Ensure that the legislative framework provides the necessary authority and resources for effective crisis management.

[Time bound]

Short-term

[Effort]

Moderate Effort

**Ensure that there exists a horizontal governance structure for tourism development, resilience building and management at each level of destination governance (national, regional, local). This structure shall include public authorities across areas with interest or influence in tourism, private tourism stakeholders (companies, residents) and other relevant stakeholders (e.g., civil protection actors)**

[Level]

National, Regional and Local

[To whom is it addressed]

National Tourism Authorities (NTA), Regional Tourism Authorities (RTA), National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO)

[Who should be involved]

National, Regional and Local Governments, Municipalities, Health Authorities, Civil Protection, Police, Fire services, Protected Areas Management Organisations, Emergency Organisations; Tourism Professional Associations, Tourism Businesses

To ensure resilience in the tourism sector, it is crucial to establish a robust coordination system that involves various stakeholders, both private and public, from within and outside the tourism ecosystem. This involves **horizontal coordination across national, regional and local government departments and agencies**, with the **different sectors of the tourism ecosystem** and **with stakeholders from other sectors** such as police, fire services, national security service, civil protection, and environmental agencies.

[Why?]

**Horizontal coordination** ensures that **government departments and agencies** with an interest or influence in tourism are fully engaged in its planning and development. This type of coordination promotes cooperation, information sharing, and joint decision-making among peers to address common challenges and opportunities. For instance, during financial crises, tourism authorities must collaborate with finance and economy departments, while in the case of human-made crises they should coordinate with the national security service.

**Coordination** between **public and private stakeholders** and with the **different sectors of the tourism ecosystem** is important for developing a cohesive approach to tourism development that considers the diverse needs and perspectives of various areas of activity.

Moreover, given that tourism is often "collateral damage" in various crisis events — be it natural, health-related, financial, or human-made— it is

**Ensure that there exists a horizontal governance structure for tourism development, resilience building and management at each level of destination governance (national, regional, local). This structure shall include public authorities across areas with interest or influence in tourism, private tourism stakeholders (companies, residents) and other relevant stakeholders (e.g., civil protection actors)**

imperative for tourism to have a **significant presence in national, regional, and local crisis preparedness and management efforts and in all pertinent discussions**. This ensures that the sector's unique needs and challenges are addressed, maintaining its "seat at the table" in decision-making processes.

[High-level implementation steps and options]

*Stakeholder mapping*

- At each level (national, regional and local) identify the key stakeholders and organisations to establish collaborative coordination to develop tourism, build resilience, to ensure crisis preparedness and to manage different types of crises (e.g., fire services in wildfires or environmental agency for water shortages).
- Map out the relationships between these stakeholders to better understand the influence and interest each stakeholder has on the tourism ecosystem and how they can contribute to better resilience and crisis management.
- Ensure that residents are considered as key stakeholders, with mechanisms for them to contribute to and be consulted in tourism-related decision-making. Also, that they are informed in crisis-related consultations.

*Define the objectives and scope for the horizontal collaborative coordination mechanism*

- Define the objectives for collaborative coordination.
- Establish the scope of the groups' activities, focusing on enhancing coordination, improving resilience, crisis preparedness and leveraging expert knowledge.

*Define the topics to be regularly discussed in the collaborative horizontal management mechanism*

- Tourism strategy development and monitoring.
- Resilience strategies and initiatives.
- Policy and regulation.
- Risk identification and analysis.
- Data sharing & insights.
- Tourism sentiment analysis.
- Crisis preparedness and planning.
- Resource allocation and support.

*Ensure systematic operation of the horizontal coordination structure*

- Conduct regular meetings (for example, twice a year).
- Ensure clear communication channels and protocols for coordination and information sharing.
- Monitor and evaluate the coordination structure's effectiveness and use the feedback gathered to make necessary policy and operational adjustments.

*Define how the horizontal coordination efforts would contribute to managing different types of crisis events*

- Define and establish the necessary horizontal coordination, outlining roles, responsibilities, and communication channels (leverage the participants of the resilience and preparedness group).

**Ensure that there exists a horizontal governance structure for tourism development, resilience building and management at each level of destination governance (national, regional, local). This structure shall include public authorities across areas with interest or influence in tourism, private tourism stakeholders (companies, residents) and other relevant stakeholders (e.g., civil protection actors)**

	<ul style="list-style-type: none"> <li>• Develop a stakeholder matrix summarising the coordination needed horizontally for different types of crisis events.</li> <li>• For country-wide crisis events:             <ul style="list-style-type: none"> <li>○ Coordination efforts should be done at central level, by the NTA or NTO. They should coordinate with the government departments responsible for managing specific crises, with national professional associations and with central emergency response organisations.</li> </ul> </li> <li>• Regional and local events:             <ul style="list-style-type: none"> <li>○ Coordination of tourism should be ensured by regional and local DMOs, who should be in close contact with NTAs/NTOs if support or guidance is needed. There should be coordination with regional and local government and municipalities or with regional civil authorities, who often are leading crisis management efforts. They should also coordinate with regional delegations of professional associations, main tourism businesses and local emergency response organisations.</li> </ul> </li> </ul>
[Time Bound]	Medium-term
[Effort]	Moderate Effort

**Establish vertical coordination mechanisms between national, regional, and local levels, which assist tourism to mitigate risk factors (e.g., environmental degradation or overtourism), build resilience across the country (e.g., through diversification) and facilitate the implementation of actions for crisis preparedness and management**

[Level]	National, Regional and Local
[To whom is it addressed]	National Tourism Organisations (NTO), Regional Destination Management Organisation (DMO)
[Who should be involved]	Regional and Local Destination Management Organisations (DMO), National Tourism Authorities (NTA), Regional Tourism Authorities (RTA)

In addition to clear governance structure, roles and responsibilities, effective coordination is essential. Coordination between the different levels is essential to build resilience and improve crisis preparedness and management. The aim of this coordination is to ensure that policies, regulations, and strategies at different governance levels are aligned and complementary.

[Why?] Policy decisions are made at different levels of government, but a **cohesive approach** with shared objectives, based on robust cooperation and planning, is critical for building a resilient tourism sector.

While national governments may have the final say in budgetary matters, local and regional governments are often better equipped to implement programmes that cater to the needs of tourism businesses. Local governments have a closer relationship with businesses and can assist in designing and implementing programmes, evaluating outcomes, and adapting to changes if necessary.

**Establish vertical coordination mechanisms between national, regional, and local levels, which assist tourism to mitigate risk factors (e.g., environmental degradation or overtourism), build resilience across the country (e.g., through diversification) and facilitate the implementation of actions for crisis preparedness and management**

[High-level implementation steps and options]

*Define the objectives, scope and participants of vertical coordination*

- Outline the goals of the coordination structure.
- Define the scope of activities, such as developing and reviewing tourism strategies, crisis preparedness plans, communication strategies, and recovery plans.
- Identify relevant participants from the horizontal coordination structures at each level to join this coordination mechanism.

*Establish a clear coordination mechanism, following the established hierarchical roles, which regularly discusses key topics on resilient tourism development and crisis management*

- **Strategic revision:** review ongoing tourism strategy development, brainstorm the product offer, marketing strategy.
- **Assess tourist trends and challenges** that might impact the tourism ecosystem.
- **Data sharing and insights analysis.**
- **Resilience building:** Develop and update crisis management plans, developing frameworks and action to improve the resilience of destinations. Discuss available funding opportunities and technical support for resilience and crisis preparedness by DMOs and companies.
- **Training & capacity building:** Provide training and capacity-building programmes as well as simulations and drill exercises for all stakeholders to enhance their understanding of crisis preparedness and resilience.
- **Risk sensing,** identify emerging risks and trends. Conduct regular risk assessment and monitoring.
- **Crisis scenario identification,** such as natural disasters, political unrest, health emergencies, terrorism, cyberattacks or economic downturns.
- **Policy & regulation:** Discuss current policies and regulations at different levels, ensure alignment at different levels (regional/local government structures should be involved in decision-making and policy implementation) and identify barriers and challenges that can be overcome by better policy.
- **Resource allocation and support needs identification.**

*Set up a communication platform to support vertical coordination between tourism management actors' structures*

- Ensure clear communication channels and practices for coordination and information sharing between actors at different levels during normal operation (aimed at resilience building and tourism development) and during crisis (rapid information sharing mechanisms, strategic decision-making support).

[Time Bound]

Medium-term

[Effort]

Low Effort

<b>Develop or revise destination-specific tourism strategies (leveraging vertical and horizontal coordination mechanisms) to define objectives and initiatives that align with national/regional/local tourism policy, which consider local specificities and include action to support resilience building and addressing key vulnerabilities, such as climate change, staff shortages and overtourism</b>	
[Level]	National
[To whom is it addressed]	National Tourism Organisations (NTO), Regional Destination Management Organisation (DMO)
[Who should be involved]	National Tourism Authorities (NTA), Regional and Local Destination Management Organisations (DMO), Regional Tourism Authorities (RTA), Professional Associations, Tourists, Residents

It is crucial to align tourism strategies with overarching national, regional, and local strategies, to maximise their effectiveness and impact. This alignment ensures that **tourism initiatives are consistent with broader economic and social goals, promoting a unified vision for sustainable and resilient development.**

It also ensures that tourism receives the necessary support (technical, financial) to effectively develop and implement its initiatives, fostering collaboration among different levels of government and stakeholders by applying horizontal coordination structures. This cohesive approach enhances the sector's resilience, enabling it to more effectively adapt to changes and challenges.

[Why?]

While considering local contexts and specificities for tourism, ensuring alignment between local, regional, and national tourism strategies facilitates seamless cooperation and integration. The vertical coordination structures should be deployed to ensure that policies are mutually supportive, strengthening institutional frameworks.

This **strategic development of tourism should prioritise resilience building and focus on designing initiatives aimed at addressing key vulnerabilities**, such as adapting to climate change and addressing potential or already existing risks of overtourism or labour shortages.

[High-level implementation steps and options]	<p><i>Review, revise or develop the Destination's Tourism Strategy</i></p> <ul style="list-style-type: none"> <li>• Review existing relevant policies and strategies with an impact on tourism (e.g., relating to environment, digitalisation, SME support, skills policies).</li> <li>• Ensure the tourism strategy aligns with the policy goals for the environmental and economic development of the destination.</li> <li>• Ensure that the destination strategy aligns with the Transition Pathway for Tourism and the European Agenda for Tourism 2030.</li> <li>• Engage stakeholders from various levels and organisations, leveraging the vertical and horizontal coordination mechanisms to capture diverse perspectives and facilitating their alignment.</li> <li>• Ensure also that tourists and residents are involved in the process as key stakeholders.</li> <li>• Consider current and emerging challenges, such as impacts of climate change, labour shortages, overtourism and infrastructure deficiencies, as well as opportunities like digitalisation, smart tourism initiatives, new source markets, innovative tourism products, and marketing and promotion strategies. All of which will enhance resilience.</li> </ul>
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**Develop or revise destination-specific tourism strategies (leveraging vertical and horizontal coordination mechanisms) to define objectives and initiatives that align with national/regional/local tourism policy, which consider local specificities and include action to support resilience building and addressing key vulnerabilities, such as climate change, staff shortages and overtourism**

*Include strategies and initiatives aimed at building resilience and sustainability (social, environmental and economic) and addressing vulnerabilities such as climate change, overtourism or labour shortages*

- Consider diversifying the tourism offer by focusing new offers on slow tourism, regenerative tourism, authentic experiences with local contexts, to cater for sustainable and conscious travellers and protect natural, cultural and historical resources.
- Aim to distribute the tourism offer and tourism flows, increase the activities in areas with lower pressure and carefully manage the tourism offer in high-pressure locations.
- Create integrated products and itineraries focused on areas with lower tourist pressure (e.g., locations away from tourist centres, attractions less known to tourists), to distribute tourism flows, create positive benefits throughout the territory from tourism and to increase the length of stay.
- Promote events and a strong activity calendar throughout the year to encourage visits on days or during seasons with lower tourist pressure, also ensure that the events align with the interests of residents, to increase resilience as regards fluctuation in visitor audiences.
- Develop and promote responsible and sustainable tourism practices that benefit the environment, economy, and local communities, and support raising the visibility of such offers for visitors and local clientele.
- Diversify the source market base to reduce dependency on a few top source markets and consider also residents as one group of the clientele.
- Ensure that tourism activities provide overall benefits (economic, social, environmental) to residents and local communities, instead of limiting or changing their way and contexts of life.
- Define a strategy to attract and retain talent by simplifying regulations and reducing bureaucratic barriers that hinder employment and business operations.
- Develop skills partnerships to support developing a targeted offer for skills development at regional/local levels (tourism-focused curriculum, internships, online training platforms and open-learning material, etc.).

*Communicate the updated Plan*

- Develop a communication strategy to share the updated tourism strategic plan with tourism businesses, tourists, residents and other stakeholders.
- Use various channels, such as media, social media, and public meetings, to ensure widespread awareness, especially regarding the key objectives to build more sustainable tourism practices, ensure consideration of residents' long-term well-being, and work towards mitigating crisis risks.

*Monitor and evaluate for data-driven destination management*

- Set indicators to monitor the impact of the plan by increasing the resilience and sustainability of the sector (e.g. tourism intensity, dependency of top 3 source markets, carbon emissions).
- Implement a data-driven destination management approach by following the established indicators systematically and making the data available for local workers and for national/regional tourism management.

**Develop or revise destination-specific tourism strategies (leveraging vertical and horizontal coordination mechanisms) to define objectives and initiatives that align with national/regional/local tourism policy, which consider local specificities and include action to support resilience building and addressing key vulnerabilities, such as climate change, staff shortages and overtourism**

[Time Bound]

Short-term

[Effort]

Moderate Effort

**Create and regularly update a Crisis Management Plan for each key destination, leveraging both horizontal and vertical tourism coordination mechanisms together with a pre-defined set of policies and measures to be activated when a crisis hits, and provide effective assistance to vulnerable tourism businesses (particularly SMEs), workers, and tourists**

[Level]

National

[To whom is it addressed]

National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO)

[Who should be involved]

National, Regional and Local Governments, National and Regional Tourism Authorities (NTA/RTA), Tourism Professional Associations, Tourism Businesses, Relevant Stakeholders in Crisis Management, Tourists, Residents

The **non-existing or limited crisis management plans** are one of the major challenges of the tourism ecosystem. Most crisis management procedures are not documented, therefore lacking clear communication protocols and organisational structures or roles for handling crises. Even when there is good cooperation with stakeholders, the absence of documented procedures for crisis situations limits the effective response and coordination.

[Why?]

Furthermore, tourism **crisis management is often not integrated into the overall crisis management plans** of destinations. There is no systematic risk sensing or evaluation of potential risks specific to tourism, leaving destinations unprepared for unexpected events. This makes the tourism sector more vulnerable to disruption, as it lacks the necessary frameworks to effectively identify risk and to prepare, manage and mitigate any crisis.

Moreover, crisis management plans always have to be improved and updated in order to be effective, considering the ever-changing environment and circumstances. Providing clear guidelines and governance structures is crucial to enhancing coordination and preparedness within the tourism ecosystem, ensuring a more effective response to future challenges and crises.

[High-level implementation steps and options]

**Crisis Management Plan:**

*Perform an initial assessment*

- Conduct a thorough review of existing crisis management plans for tourism (*if any already exist*) to identify gaps and areas of improvement.
- Review existing crisis management plans which can have an influence on the destination.



Create and regularly update a Crisis Management Plan for each key destination, leveraging both horizontal and vertical tourism coordination mechanisms together with a pre-defined set of policies and measures to be activated when a crisis hits, and provide effective assistance to vulnerable tourism businesses (particularly SMEs), workers, and tourists

*Revise/Outline the crisis management plan structure, to include the following main chapters*

- Governance structures and processes and team setup.
- Coordination structures and decision capacity.
- Stakeholder management structures.
- Communication teams, processes, and channels.
- Information management processes.
- Impact analyses of structures and processes.
- Measures to implement.

*Create a pre-defined set of policies and measures to activate when a crisis hits and provide prompt and effective assistance to vulnerable tourism businesses (particularly SMEs), workers, and tourists*

The pre-defined set of policies and measures should consider the following areas:

- **Financial and Fiscal:** to support businesses, preventing defaults and insolvency by providing the necessary liquidity to continue operating during a crisis and to make the necessary investments to prepare for re-opening. These measures can include, for example, guarantee schemes, direct grants, and bank loans, temporary VAT exemptions and reductions, tax credits, tax deferrals and tax-related liquidity and flexibility in tax payment.
- **Social:** to protect workers and employees by providing the necessary support to retain the workforce and make it better prepared for the re-opening. Also, to help sustain domestic demand during a crisis and therefore, serve as an automatic economic stabiliser. These measures can include, for example, temporary layoffs, income protection, short time working schemes, wage subsidies/compensations, job retention schemes, exemptions from paying social security contributions and training/learning courses.
- **Data & Digital-Related:** to support decision-making and have a comprehensive understanding of the evolution of a crisis. These measures can include, for example, buying additional data sets, creating crisis management dashboards, setting up pools of experts and stakeholder to collect info, developing digital platforms to monitor crisis events.
- **Promotional:** to keep tourists engaged during crisis events and stimulate demand on re-opening. These measures can include, for example, promotional campaigns for the domestic and international markets, vouchers to stimulate demand and subsidies for citizens.
- **Health & Safety related:** to help restore consumer trust in the tourism and travel sectors. These measures can include initiatives related to the health and safety of residents and tourists, such as, training, guidelines, and certification schemes.

*Regularly review and update the plan*

- Establish a schedule for regular updates and revisions to keep the plans current and relevant.

**Create and regularly update a Crisis Management Plan for each key destination, leveraging both horizontal and vertical tourism coordination mechanisms together with a pre-defined set of policies and measures to be activated when a crisis hits, and provide effective assistance to vulnerable tourism businesses (particularly SMEs), workers, and tourists**

*Develop a Crisis Communication Plan as an annex to the Crisis Management Plan*

- List the internal and external stakeholders and information needs.
- Document the protocols for internal and external communication and the media.
- Prepare pre-approved crisis messages and customise them depending on the crisis scenarios.
- Define the most appropriate communication channel to disseminate information during a crisis.
- Address press releases and media queries via a designated spokesperson.
- Monitor social media activities throughout the crisis lifecycle.

*To ensure the effectiveness of the crisis management plan*

- Establish monitoring and evaluation mechanisms to assess the effectiveness of the pre-defined policies/initiatives.
- Ensure alignment with national, regional and local levels and with different stakeholders.
- Ensure the plan is done at the national level and adapted at the regional and local ones, considering their specificities and responsibilities.

[Time Bound]

Short-term

[Effort]

Moderate Effort

**Optimise at national, regional and local levels (leveraging vertical coordination mechanisms) the reach of existing public communication mechanisms for crisis communication and information (also considering a reverse emergency number system for urgent communications), or develop new ones, to effectively inform tourism businesses, tourists and residents on the measures in force in the event of a crisis**

[Level]

National

[To whom is it addressed]

National Tourism Organisations (NTO), Regional Destination Management Organisation (DMO)

[Who should be involved]

National Tourism Authorities (NTA), Regional Tourism Authorities (RTA), Regional and Local Destination Management Organisations (DMO), Industry Associations, Tourism Businesses, Residents, Tourists, National and regional statistical institutes (NSI)

**Clear communication channels and access to accurate information are critical needs** for the tourism ecosystem to effectively respond and recover from future crisis events.

[Why?]

In times of crisis, **transparent communication ensures that relevant information reaches all stakeholders, including tourism businesses, tourists, and residents.** It enables the dissemination of vital updates, safety protocols, and travel advisories, allowing businesses to adapt their operations and to make informed decisions.

Optimise at national, regional and local levels (leveraging vertical coordination mechanisms) the reach of existing public communication mechanisms for crisis communication and information (also considering a reverse emergency number system for urgent communications), or develop new ones, to effectively inform tourism businesses, tourists and residents on the measures in force in the event of a crisis

Currently, in some destinations, there are no communication platforms providing crisis communication and information to tourism businesses, tourists, and residents. Where such platforms do exist, they often fail to cover all relevant stakeholders or address all necessary topics. It is, therefore, important to optimise existing communication platforms, or develop new ones, to effectively inform tourism businesses, tourists and residents during crisis events.

[High-level implementation steps and options]

*Assess existing communication platforms and identify needs*

- Evaluate the effectiveness of current public platforms used for communication and information. Assess their reach, usability, and the type of information they provide.
- Ascertain any gaps in their use for crisis communication and information and in their reach to the targeted audience: tourism businesses, tourists and residents.

*Define how the crisis communication and information sharing platform should look like and its functional and technical requirements*

- It should target Tourists, Tourism Business and Residents – and cover all pertinent information related to the crisis event, such as:
  - Relevant news updates and developments regarding the crisis.
  - Indicators & Data about the evolution of the crisis. Cooperate with national/regional statistical offices, to collect this information.
  - Government policies and directives.
  - Travel advice, restrictions, and protocols for tourists.
  - Guidelines for tourism businesses.
  - Available financial and technical support, including information on how to apply.
  - Tips and resources for crisis preparedness and management.
  - Other essential information relevant to informed decision-making and situational awareness.
- It should be an intuitive and user-friendly interface that is accessible across various devices, including desktops, tablets, and smartphones.
- It should be regularly updated with relevant information for the target stakeholders to ensure its relevance and reliability.

*Design or update a crisis communication platform*

- Improve an existing communication platform or design a new one considering the assessment done and the established functional and technical requirements.

*Develop a Crisis Communication AI Chatbot to support users of the platform*

- Implement an AI-powered chatbot that can provide stakeholders with real-time information and assistance during a crisis, available in multiple languages and available 24/7.

Optimise at national, regional and local levels (leveraging vertical coordination mechanisms) the reach of existing public communication mechanisms for crisis communication and information (also considering a reverse emergency number system for urgent communications), or develop new ones, to effectively inform tourism businesses, tourists and residents on the measures in force in the event of a crisis

	<p><i>Implement a strong promotional campaign to create awareness of this platform</i></p> <ul style="list-style-type: none"> <li>• Launch a campaign to promote the platform to tourism businesses, tourists, and residents. Use various channels such as social media, e-mail newsletters, and industry events.</li> </ul>
[Time Bound]	Medium-term
[Effort]	Moderate Effort

Develop and deliver training programmes, adapted learning material and promote knowledge sharing and collaboration to build capacity for public and private sector and tourism professionals in resilience building, crisis preparedness and management

[Level]	National
[To whom is it addressed]	National Tourism Authorities (NTA), Regional Tourism Authorities (RTA), National Tourism Organisations (NTO), Regional Destination Management Organisations (DMO)
[Who should be involved]	Regional and Local Destination Management Organisations (DMO), Industry Associations, Tourism Businesses, Experts in Crisis Management, Universities, Tourism Schools

Public Tourism Organisations mostly at the regional and local levels and tourism businesses and professionals need to be better equipped and prepared with the necessary **skills and knowledge** to build resilience and mitigate and manage the impacts of crisis events.

[Why?] Nonetheless, they often **lack the expertise and training** in these topics, particularly among smaller local and regional DMOs. This is also evident in SMEs, which often lack the resources to develop these capabilities.

Additionally, there is a **general lack of awareness about risks and crises among tourism stakeholders and politicians**. This shortage contributes to a deficiency in crisis management expertise, making it challenging to formulate and implement comprehensive crisis management strategies.

[High-level implementation steps and options]	<p><i>Create comprehensive training programmes tailored to resilience building and crisis management and response</i></p> <ul style="list-style-type: none"> <li>• Conduct assessments to identify specific training needs within the tourism ecosystem.</li> <li>• Identify and engage crisis management experts, trainers, and facilitators with experience in the tourism sector.</li> <li>• Design a training framework that outlines the key topics, learning objectives, and delivery methods for resilience building and crisis preparedness and management.</li> <li>• Allocate the necessary resources, including funding, trainers, and material, to support capacity-building. Leverage existing knowledge and training material and programmes.</li> </ul>
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**Develop and deliver training programmes, adapted learning material and promote knowledge sharing and collaboration to build capacity for public and private sector and tourism professionals in resilience building, crisis preparedness and management**

- Leverage twinning opportunities with organisations with a similar mandate or similar types of destination, to work together in resilience building and in developing crisis preparedness, sharing knowledge, training material and courses, and best practices.

*Offer targeted training programmes to enhance the capacity of different stakeholders, including residents and SMEs*

- Organise and deliver training programmes for different target audiences, including government officials, tourism business owners, managers, and front-line workers, with the support of tourism and training experts.
- Provide specialised training in resilience building and crisis management for tourism professionals.
- Include a combination of classroom-based sessions, online modules, interactive workshops, case studies, mentoring programmes, and networking events.
- Ensure that the programme is targeted at a wide range of tourism businesses, including SMEs, through different formats and flexible delivery options.

*Incorporate (or lobby for) crisis preparedness and management education into tourism courses at schools and universities as an optional subject*

- Adapt the study plan to the different needs of stakeholders.
- Some of the topics it can include:
  - Introduction to crisis management in tourism
  - Assess your crisis readiness
  - Your governance model
  - Assess risks to protect your organisation.
  - Assess and strengthen your crisis management resilience
  - Who else is involved?
  - Using data to manage a crisis
  - What to do when a crisis hits? Measures and best practices
  - Create you action plan
  - Engage your stakeholders
  - Sustainable and resilient tourism practices
  - Digital transformation and innovation
  - Financial and funding options

[Time Bound]

Medium-term

[Effort]

High Effort

**Prioritise the available funding from national and regional operational programmes to support resilience building and crisis preparedness for tourism authorities at local/regional levels and for SMEs**

[Level]

National

[To whom is it addressed]

National Government, Funding Management Authorities, National Tourism Authorities (NTAs), Regional Tourism Authorities (RTA)

[Who should be involved]

National Tourism Organisations (NTO), Regional and Local DMOs, Professional Associations, Tourism Businesses

[Why?]

**Prioritise the available funding from national and regional operational programmes to support resilience building and crisis preparedness for tourism authorities at local/regional levels and for SMEs**

**Adequate resource allocation and funding are critical for the tourism ecosystem to build resilience, develop preparedness for crisis events, and effectively manage and recover during such events.**

It requires sufficient financial resources to invest in proactive measures that enhance the ecosystem's ability to withstand and adapt to crises. It also requires adequate funding during crises to enable the deployment of timely response measures, such as emergency support for affected businesses and destinations, communication campaigns to rebuild trust, and targeted recovery initiatives.

Overall, tourism organisations, both public and private, **lack the necessary financial resources to develop crisis management preparedness**. These organisations have limited resources, which they end up prioritising to areas that need urgent attention or to the areas mostly related to their mandate and operation, such as promotion or product development. This is most noticeable in public organisations at the regional and local levels – regional tourism authorities and the regional and local DMOs.

It is, therefore, crucial to prioritise national and regional funding to support resilience-building and crisis preparedness initiatives. Organisations also have a key role to play by maximising funding opportunities and reallocating part of their budgets to support these initiatives.

[High-level implementation steps and options]

*Assess the needs of the ecosystem*

- Engage with tourism stakeholders (destination management organisations of different levels, professional associations, tourism businesses) to gather input on their needs and priorities in the topics or in terms of resilience building and crisis preparedness.
- Engage with policy makers to identify policy priorities.
- Identify already existing funding opportunities driving the tourism ecosystem to analyse gaps in funding and resources distribution.

*Define objectives and scope*

- Outline main objectives of the resources to be prioritised for resilience building and crisis preparedness.
- Specify the type of projects and initiatives that are eligible, including strategies to improve crisis preparedness, implementation of crisis management plans, resilient and sustainable tourism products and services development, digitalisation, enhancement of data collection, analysis and reporting.
- Specify the stakeholders eligible to apply, including NTOs, DMOs, university, invocation hubs, tourism professional associations and tourism companies.

*Prioritise in the budget support for resilience building and crisis preparedness initiatives within the tourism ecosystem*

- Prioritise resources from the national and regional operational programmes for these areas.
- Develop and launch open calls designed to enhance crisis preparedness and management capacity within the tourism ecosystem.

**Prioritise the available funding from national and regional operational programmes to support resilience building and crisis preparedness for tourism authorities at local/regional levels and for SMEs**

*Create awareness and build the capacity of the tourism ecosystem to leverage existing opportunities*

- Publicise the open calls to reach target audiences.
- Issue guidelines with general recommendations for tourism organisations and businesses, advising them to:
  - Develop a funding strategy that includes a mix of sources such as grants, loans, and subsidies.
  - Diversify revenue streams to enhance financial sustainability and reduce reliance on any single source of income.
  - Proactively identify and apply for national and regional grants, subsidies, and financial aid programmes aimed at bolstering tourism resilience and crisis management.
  - Allocate a portion of their budgets towards crisis preparedness and resilience-building activities.

[Time Bound]

Medium-term

[Effort]

High Effort

**Provide technical assistance for tourism SMEs to improve their resilience, crisis preparedness and response to crises, and to ensure their capacity to take advantage of the available funding opportunities at local, regional, national and EU level to fund their development**

[Level]

National

[To whom is it addressed]

National Government, Funding Management Authorities, National Tourism Authorities (NTA), Regional Tourism Authorities (RTA)

[Who should be involved]

National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO), Professional Associations, Tourism Businesses (SMEs)

**Adequate resource allocation and funding are critical for the tourism ecosystem to build resilience, develop preparedness for crisis events, and effectively manage and recover during such events.** It requires sufficient financial resources to invest in proactive measures that enhance the ecosystem’s ability to withstand and adapt to crises. It also requires adequate funding during crises to enable the deployment of timely response measures, such as emergency support for affected businesses and destinations, communication campaigns to rebuild trust, and targeted recovery initiatives.

[Why?]

**SMEs**, which are vital to the industry, **struggle with financial constraints**. Many are still recovering from the financial impact of COVID-19, having taken loans to survive the pandemic. This financial burden makes it difficult for them to invest in the necessary resilience building and crisis management resources, leaving the tourism ecosystem vulnerable and less resilient to future disruptions.

Therefore, it is crucial to advocate for financial support for SMEs to enhance their resilience and crisis preparedness, and to equip them with the skills needed to successfully access funding, as they are one of the most vulnerable groups within the tourism ecosystem.

**Provide technical assistance for tourism SMEs to improve their resilience, crisis preparedness and response to crises, and to ensure their capacity to take advantage of the available funding opportunities at local, regional, national and EU level to fund their development**

<p>[High-level implementation steps and options]</p>	<p><i>Identify funding opportunities for SMEs</i></p> <ul style="list-style-type: none"> <li>• Identify and list all existing funding opportunities targeted at SMEs, for which tourism SMEs can apply.</li> <li>• Communicate, to raise the awareness of tourism SMEs to these existing funding opportunities.</li> </ul> <p><i>Assess SMEs needs and funding gaps</i></p> <ul style="list-style-type: none"> <li>• Identify the specific resilience and crisis preparedness needs of SMEs within the tourism sector. Understand their current challenges in managing crises and their requirements for financial support.</li> <li>• Evaluate the existing funding landscape to identify gaps and barriers that SMEs face in accessing financial support.</li> </ul> <p><i>Press national and regional funding management authorities to provide more funding for SMEs</i></p> <ul style="list-style-type: none"> <li>• Advocate for more calls targeted at the development of the resilience and crisis preparedness of SMEs.</li> <li>• Positively discriminate SMEs in the evaluating criteria of open calls, to improve their levels of success in receive funding.</li> </ul> <p><i>Build SME capacity to successfully find and apply for funding opportunities</i></p> <ul style="list-style-type: none"> <li>• Offer training and support to tourism organisations to help them identify and effectively apply for available funding opportunities.</li> <li>• Include a combination of classroom-based sessions, online modules, interactive workshops, case studies, mentoring programmes, and networking events.</li> <li>• Some of the topics for focus should include:             <ul style="list-style-type: none"> <li>○ What is the funding landscape like?</li> <li>○ Where to find information about open calls?</li> <li>○ How to identify which calls are targeted to tourism SMEs or, even if not targeted, to which tourism SMEs can apply?</li> <li>○ What are the most important things to consider when designing a project to apply for a call? How to do a budget? Who should be involved?</li> <li>○ How to fill out an application for a call? What are the tips, dos and don'ts, to increase the chances of success?</li> <li>○ Examples of successful applications</li> </ul> </li> </ul>
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[Time Bound]	Short-term
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[Effort]	Moderate Effort
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**Assess the data needs of tourism stakeholders and expand the data source base, accordingly, considering both public and private data providers and partnerships with industry**

[Level]	National
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[To whom is it addressed]	National Tourism Organisations (NTO), Regional Destination Management Organisations (DMOs)
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[Who should be involved]	National Tourism Authorities (NTA), Regional Tourism Authorities (RTA), Regional and Local Destination Management Organisations (DMO), Tourism Professional Associations and Organisations, Private Data Providers
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**Assess the data needs of tourism stakeholders and expand the data source base, accordingly, considering both public and private data providers and partnerships with industry**

The availability and quality of data are critical for tourism development, resilience building and for crisis preparedness, response, and recovery. However, many destinations and businesses **lack access to updated and reliable data.**

**Publicly available data**, such as that from official statistical offices, **is often outdated and lacks the frequency and granularity needed for effective decision-making.**

[Why?]

Additionally, it fails to provide forward-looking indicators, essential for predicting and monitoring the impacts of crises - such as their severity and duration—and for stimulating the recovery and re-start of tourism.

Regional and local tourism organisations and SMEs are the organisations most limited in terms of access to data sources and tools, hindering informed decision-making.

Therefore, it is suggested that **NTOs and Regional DMOs**, with their greater resources and capacity, take the lead and **assess the data needs of tourism stakeholders and expand their source database**, considering both public and private data providers and partnerships with industry.

[High-level implementation steps and options]

*Assess current data needs of the destination management organisations and of the tourism ecosystem stakeholders*

- Collaborate with national, regional, and local tourism organisations to evaluate existing data and needs.
- Identify the data currently collected by the different tourism ecosystem sectors as well as their specific needs.
- Identify gaps in data availability, frequency, granularity, and forward-looking indicators.

*Develop a list of indicators, tools and metrics that meets the identified needs and facilitates evidence-based decision-making*

- Analyse the previously collected information to develop a set of indicators that address identified needs. These indicators will support the destination and ecosystem in decision-making and enhance their capabilities to manage the destination, build resilience and prepare for, respond to, and recover from crisis events.
- Potential data/indicators can include:
  - **Crisis prediction and monitoring indicators**, such as economic, social, and environmental metrics.
  - **Trends and Sentiment Analysis:** tourists' preferences, social media traffic, tourism confidence indicators, travel intentions, and search volume for specific topics.
  - **Land Transport:** car rental bookings, train passenger bookings.
  - **Water Transport:** cruise intentions and bookings.
  - **Air Transport:** airline seats, routes, flight bookings, capacity, cancellations, search volumes, and load factors.
  - **Accommodation and Food Services:** hotel bookings, future occupancy rates, short-term rental bookings.
  - **Travel Agencies and Operators:** bookings and cancellations.

Assess the data needs of tourism stakeholders and expand the data source base, accordingly, considering both public and private data providers and partnerships with industry	
	<ul style="list-style-type: none"> <li>○ <b>Conventions and Trade Shows:</b> scheduled events.</li> <li>○ <b>Mobility:</b> data mobility apps.</li> <li>○ <b>Telecommunications:</b> data from telecommunication operators.</li> <li>○ <b>Financial Transactions:</b> credit card use.</li> <li>○ <b>Infrastructure Data:</b> traffic control systems, sensors, and Wi-Fi analytics.</li> </ul> <p><i>Engage industry associations and tourism ecosystem organisations to establish partnerships for data collection</i></p> <ul style="list-style-type: none"> <li>• Engage with industry associations and tourism organisations to facilitate data sharing.</li> <li>• Emphasise the mutual benefits of accessing diverse data sources across the ecosystem.</li> </ul> <p><i>Map private data sources/providers and evaluate establishing partnerships or acquiring necessary data</i></p> <ul style="list-style-type: none"> <li>• Explore and map private data providers to address data gaps.</li> <li>• Potential sources can include Mabrian, ForwardKeys, Skift, Duetto, OAG, CarTrawler, ICAO, IATA, Sojern, ACI-EUROPE, Google, telecom operators, Data Appeal, and AirDNA.</li> </ul> <p><i>Perform a cost/benefit analysis</i></p> <ul style="list-style-type: none"> <li>• Perform a cost/benefit analysis to ascertain the most appropriate and cost-effective solutions and decide what indicators and sources will be used to expand source databases.</li> </ul>
[Time Bound]	Short-term
[Effort]	Moderate Effort

Develop a data platform, which allows destination management and relevant tourism ecosystem actors to explore, integrate, and analyse data in order to get insights on the tourism activity during normal and possible crisis periods	
[Level]	National
[To whom is it addressed]	National Tourism Organisations (NTO), Regional Destination Management Organisations (DMO)
[Who should be involved]	National Tourism Authorities (NTA), Regional Tourism Authorities (RTA), Regional and Local Destination Management Organisations (DMO), Tourism Professional Associations, Tourism Businesses

[Why?] The tourism ecosystem needs **available, reliable, centralised, frequently updated data sources and indicators to make informed decisions to manage the destination, monitor strategic development and to forecast/predict in advance and monitor the impacts (e.g., severity and length) of a crisis event.**

Many destinations face significant challenges in **data collection and analysis**. The potential of big data remains largely untapped, as many organisations lack the necessary mechanisms for effective data collection and analysis. This issue is compounded by a **lack of advanced systems and technology**. This is particularly the case of regional and local destination management organisations and SMEs.

**Develop a data platform, which allows destination management and relevant tourism ecosystem actors to explore, integrate, and analyse data in order to get insights on the tourism activity during normal and possible crisis periods**

Such systems are essential to aggregate data from different sources, perform comprehensive analyses, and correlate different indicators. Furthermore, there is a lack of incorporation of new technologies, such as AI, which could significantly enhance decision-making processes and the development of predictive models. These models would be crucial for effective destination management, crisis preparedness and management, offering insights that enable proactive measures and swift responses.

Additionally, **the tourism ecosystem suffers from a noticeable absence of open data platforms, which would enable information sharing among various stakeholders.** The public and private sectors often operate in silos with minimal data exchange, hindering comprehensive analysis and informed decision-making. This fragmentation not only limits the ability to promptly identify and respond to trends and risks, but also undermines the overall resilience and competitiveness of the tourism industry.

It is, therefore, important to **develop data collection & analysis platforms with tools to collect, integrate, transform, correlate and analyse data and generate insights, to support destination management and provide intelligence to the tourism ecosystem via an open data platform.**

[High-level implementation steps and options]

*Establish the necessary technical infrastructure to create an intelligence platform for the destination*

- Build the necessary infrastructure to collect, store, and analyse data from various sources.

*Create a centralised tourism data platform to aggregate real-time data, serving as an early warning system and providing comprehensive insights for decision-making and destination management*

- Create a centralised tourism data platform that aggregates real-time data from various sources such as the ones identified in the previous recommendation. This platform can be used both as an early warning system providing alerts about the variation of certain indicators and providing comprehensive insights to support destination management.
- The solution should enable:
  - **Data Collection, Storage, and Analysis:** gather, store, and analyse an extensive and diverse set of data from different information sources, centralised in an analytical platform, facilitating access and consultation by different stakeholders.
  - **Real-Time Destination Monitoring:** obtain a real-time view of the destination through the monitoring of relevant indicators for its management, such as those related to the destination's tourism demand and supply, as well as its resilience and sustainability.
  - **Early warning systems:** within the data space to detect potential crises. These systems should be capable of promptly alerting relevant stakeholders to enable swift action to be taken.
  - **Tools for scenario planning and simulation:** that allow stakeholders to model different crisis scenarios and test their response strategies, improving preparedness and resilience.
  - **Destination Insights:** generate insights that are useful for destination management, supporting real time decision-making and strategy development.

**Develop a data platform, which allows destination management and relevant tourism ecosystem actors to explore, integrate, and analyse data in order to get insights on the tourism activity during normal and possible crisis periods**

- **Tourism Recovery Analytics:** post-crisis, analyse data to assess the impact on tourism and identify recovery trends. This information can guide recovery strategies and help prioritise areas that need immediate attention and support.
- **Stakeholder Information Dissemination:** Provide relevant information to stakeholders – regional and local DMOs and tourism businesses - within the tourism ecosystem, increasing their capacity.

*Develop predictive models that forecast tourist flows based on various factors, including seasonality, events, and potential crises, enabling better planning and management*

- Use collected data to develop predictive models that can forecast potential crises and their impacts.
- Use predictive models in simulations to test preparedness and response strategies.
- Regularly evaluate and refine models based on feedback and evolving challenges.

*Adopt new digital tools, including an AI copilot to support data analysis and provide insights to support decision-making*

- Adopt new digital tools, including an AI copilot to support data analysis and provide insights to support decision-making. This AI solution can help in decision-making by predicting outcomes based on historical data and current trends.

*Enhance data access and sharing with tourism stakeholders*

- Make data available to all tourism stakeholders through an open platform.
- Develop interactive dashboards for real-time data access and analysis tailored to the different needs and usage of different profiles.

*Develop Data Governance Policies*

- Implement robust data governance structures to oversee data quality, privacy, and security.
- Define clear roles and responsibilities for data management.

*Train the tourism ecosystem to build data analysis capacity*

- Design a toolkit of indicators and metrics to improve understanding and interpretation of data.
- Conduct workshops and training sessions to enhance stakeholders' skills in data-driven decision-making and crisis preparedness.

[Time Bound]

Medium-term

[Effort]

High Effort

## ii. Policy recommendations for EU Level

**Incorporate as part of the tasks of the Commission’s informal expert group Together for EU Tourism (T4T), assessing industry sentiment for improve the ecosystem’s capacity to early identify potential disruptions**

[Level]	European
[To whom is it addressed]	European Commission
[Who should be involved]	Commission’s experts group Together for EU Tourism (T4T)

**Constantly monitoring industry sentiment is an important proactive initiative as it allows policymakers and industry stakeholders to stay ahead of emerging trends, challenges, and concerns within the tourism ecosystem.** Such networks are valuable to identify early warning signals of challenges and issues in the different tourism ecosystems.

[Why?]

To support the advance of the Transition pathway for Tourism towards green and digital transition, and improve resilience of the tourism ecosystem, in its co-implementation phase, the Commission has created an expert group composed of a large range of tourism ecosystem stakeholders.

The diverse range of expertise brought together in this group — including individual experts, professional associations from different sectors of the tourism ecosystem, Member State authorities, and other relevant tourism organisations —makes it the ideal setting for assessing industry sentiment and gathering information. This will support the early identification of challenges and issues and provide valuable insights for the sector.

[High-level implementation steps and options]

*Review the set of tasks attributed to the expert group*

- Revise the task list and ensure participating organisations commit to responding to the monthly questionnaire.

*Implement monthly pools with a set of questions that would allow stakeholders to provide their view and concerns for the sector*

- Design a set of standard questions that cover key areas of interest, including current challenges, emerging trends, and stakeholder concerns within the tourism sector.
- Select the appropriate survey tool (e.g., EU Survey) and implement the required mechanisms for distributing the survey to participants.

*Analyse the results of the pools*

- Define clear metrics for evaluating the replies, such as sentiment scores, frequency of specific concerns, and overall trends.
- Develop a framework for analysing the replies, including methods for quantifying and interpreting sentiment data.
- Extract key insights from the data that can provide information on decision-making and address challenges identified within the sector.
- Create detailed reports summarising the findings, including quantitative data and qualitative observations.
- If needed, further analyse the most important topics at the expert group meeting.

**Incorporate as part of the tasks of the Commission’s informal expert group Together for EU Tourism (T4T), assessing industry sentiment for improve the ecosystem’s capacity to early identify potential disruptions**

	<p><i>Share the results of the analysis, ensuring that insights reach the relevant stakeholders</i></p> <ul style="list-style-type: none"> <li>• Prepare and distribute reports to stakeholders, including policymakers, tourism organisations, and industry professionals.</li> </ul>
[Time Bound]	Short-term
[Effort]	Low Effort

**Prepare the Together for EU Tourism (T4T) resilience working group to be established as the EU-level tourism crisis management group if needed**

[Level]	European
[To whom is it addressed]	European Commission
[Who should be involved]	T4T resilience working group, Cross-Border Professional Associations

[Why?]

**The tourism ecosystem is characterised by its diversity**, encompassing eight different sectors. The effects of crisis events impact differently on each sector and a variety of actions are required to fulfil the specific needs of each one.

During a crisis event, direct lines of interaction between public entities and tourism ecosystems’ sectoral associations are required to **ensure policies are well targeted** and appropriately adjusted to the sector’s needs. They are also needed to **ensure the necessary coordination** with and among the different tourism ecosystems, as the existing dependencies can be bottlenecks or enablers for recovery.

The Commission’s T4T Resilience Working Group should be prepared to be established as the EU-level tourism crisis management group, if needed, during crisis events, to improve coordination between policymakers, industry stakeholders, and the different sectors within the tourism ecosystem.

[High-level implementation steps and options]	<p><i>Review the role and powers of the T4T resilience working group for it to be the EU-level tourism crisis management group, if needed</i></p> <ul style="list-style-type: none"> <li>• Review and update the roles and powers of this group and formalise it as the EU-level tourism crisis management group.</li> </ul> <p><i>Prepare it to be the EU-level tourism crisis management group, if needed</i></p> <ul style="list-style-type: none"> <li>• This structure should be activated on the occurrence of incidents that can be, or could lead to, a disruption, loss, emergency, or crisis. The structure should be maintained during the crisis event.</li> <li>• Develop and implement direct communication channels to be activated, if needed.</li> <li>• Define information management procedures.</li> <li>• Set the frequency of meetings according to the stage and severity of the crisis. Participants should meet regularly, for instance, weekly during the initial stages of the crisis and monthly during the recovery phase, to ensure timely coordination and effective response.</li> </ul>
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**Prepare the Together for EU Tourism (T4T) resilience working group to be established as the EU-level tourism crisis management group if needed**

*Define additional stakeholders that can participate in the crisis group*

- Identify other relevant organisations that may be invited to participate in discussions in case of a crisis. They should meet the following criteria:
  - Representative of its tourism ecosystem, having key companies as members.
  - Representative of sectors that can provoke a systemic shock/domino effect.
  - Representative of the most vulnerable sectors (those with high fixed costs, no demand or that cannot deliver substitute products or services during a crisis).
  - Able to provide and share critical data and information.
  - Able to act and have a strong influence over their members.
  - The group should have a limited number of participants, otherwise, crisis management will not be effective.

*Define the focus areas/topics to be discussed in this working group when activated for crisis management*

- Information sharing.
- Monitoring of the evolution of incidents/crisis.
- Risk assessment.
- Policy and measures evaluation.
- Stakeholder needs' identification and support.
- Communication coordination.

[Time Bound]

Medium-term

[Effort]

Low Effort

**Leverage the EU Tourism Platform to enhance knowledge sharing, collaborative work and twinning opportunities, by actively engaging tourism actors with the help of the resilience working group developing and sharing materials and animating discussions**

[Level]

European

[To whom is it addressed]

European Commission

[Who should be involved]

National Tourism Organisations (NTOs), Regional and Local Destination Management Organisations (DMO), Professional Associations, Tourism Businesses (SMEs), Resilience Working Group, Tourism Networks and Clusters, Experts, Universities, Tourism Professionals

Knowledge sharing among different countries, sectors within the ecosystem, and public and private stakeholders at various levels is essential for the tourism ecosystem to enhance its preparedness and response to crisis events.

[Why?]

The **EU Tourism platform will be the ideal setting to enhance collaborative work, foster discussions, share knowledge and leverage twinning opportunities.** This collaborative knowledge-sharing process will enable the tourism ecosystem to leverage collective expertise and innovative solutions, leading to improved resilience and crisis management practices.

**Leverage the EU Tourism Platform to enhance knowledge sharing, collaborative work and twinning opportunities, by actively engaging tourism actors with the help of the resilience working group developing and sharing materials and animating discussions**

<p>[High-level implementation steps and options]</p>	<p><i>Disseminate information about the EU Tourism platform</i></p> <ul style="list-style-type: none"> <li>• Leverage the communication campaign that will be developed upon the official launch of the EU Tourism platform, to promote its use for collaborative work and knowledge sharing on the topics of resilience, crisis preparedness and management.</li> <li>• Use the existing list of stakeholders from the Crisis Management and Governance in Tourism Project as a starting point for inviting key actors to share their action plans and other crisis management material. They are also invited to initiate and participate in discussions about the topic.</li> </ul> <p><i>Incentivise target audiences – DMOs, industry associations, experts to share relevant information to improve reliance, crisis preparedness and management</i></p> <ul style="list-style-type: none"> <li>• Motivate stakeholders to share their crisis management plans, enabling them to receive constructive feedback and comments on their crisis governance structures and mechanisms.</li> <li>• Encourage the upload and dissemination of case studies and best practices, research reports, and white papers that offer insights into effective crisis management and resilience-building efforts.</li> <li>• Encourage the resilience working group to participate and promote periodic discussions on topics related to resilience and crisis management, to facilitate ongoing knowledge exchange and collaboration.</li> <li>• Regularly survey tourism actors to monitoring sentiment, identify trends and risk sensing.</li> </ul> <p><i>Ensure use of systematic keywords and communicate them to stakeholders, and that they apply them correctly when uploading material, ensuring this material can be easily found</i></p> <ul style="list-style-type: none"> <li>• Ensure the platform has clear guidelines to support stakeholders uploading material relating to resilience building and crisis management, as there is no direct EU Tourism action topic area for it.</li> <li>• Collect feedback about the searchability and usability of the EU Tourism Platform for resilience and crisis management, as a cross-cutting topic.</li> </ul>
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[Time Bound]	Short-term
[Effort]	Low Effort

**Ensure systematic availability of funding resources to support local and cross border resilience building and crisis preparedness**

[Level]	European
[To whom is it addressed]	European Commission
[Who should be involved]	National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO), Professional Associations, Tourism Businesses (SMEs)
[Why?]	The ecosystem's capacity to invest in resilience and crisis management expertise, capabilities and resources is limited. Moreover, after experiencing crisis events, the investment capacity of tourism ecosystem stakeholders



**Ensure systematic availability of funding resources to support local and cross border resilience building and crisis preparedness**

becomes further constrained, which restricts their ability to make the necessary investments in the post-crisis period.

This cycle places significant stress on stakeholders, hindering their capacity to enhance resilience, invest in long-term sustainability, allocate resources adequately, and effectively respond to future crises.

**Systematic funding resources to support cross-border initiatives should be ensured**, given the financial limitations that tourism destinations and businesses face in investing in resilience and crisis management expertise, capabilities and resources, **and the need to improve collaboration and collectively develop resilience and crisis preparedness.**

[High-level implementation steps and options]

*Assessment of the ecosystem needs*

- Engage tourism stakeholders (tourism organisations at EU, national and regional levels, local levels, professional associations, tourism businesses) to gather input on their needs and priorities.
- Engage with policy makers to identify policy priorities.

*Define the objectives and scope*

- Outline main policy goals, such as improving the resilience of the EU tourism ecosystem, enhancing crisis management capabilities, and supporting digitalisation and sustainability efforts.
- Specify the stakeholder to target, which include NTOs; regional and local DMOs, professional associations, tourism businesses (particularly SMEs).

*Define the types of projects and initiatives that should be eligible for funding, which should include*

- Development of comprehensive strategies for improving crisis management across neighbouring countries or regions, including proactive planning and preparedness measures.
- Development of cross-border initiatives to improve the tourism offer and services, supplement existing products with joint assets.
- Creation and implementation of crisis management plans.
- Development of training programmes and guidance material to enhance the capacity of stakeholders in crisis management and responses.
- Promotional campaigns to increase awareness of crisis management policies and measures.
- Enhancement of data collection, analysis and reporting.
- Development and implementation of structures and processes for crisis management.

*Promote existing funding programmes which can support financial resources for key tasks and communicate them to stakeholders*

- Identify different funding programmes to provide systematic support to cross-border resilience and crisis preparedness initiatives, and also earmark funding to tourism destinations and businesses (particularly SMEs). Ensure the relevant calls are clearly visible in EU Guide for funding on tourism and EU Tourism platform.
- Provide guidance and assistance to applicants to help them navigate the application process and maximise the impact of their projects (for example through Enterprise Europe Network, EU Tourism platform).

**Ensure systematic availability of funding resources to support local and cross border resilience building and crisis preparedness**

[Time Bound] Short-term

[Effort] High Effort

**Create a common framework to support tourism destinations and businesses in assessing and sharing information about risks and mitigation measures and facilitate broad uptake of such a tool**

[Level] European

[To whom is it addressed] European Commission

[Who should be involved] National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO), Professional Associations, Tourism Businesses (SMEs)

The tourism ecosystem does not engage frequently in **risk sensing** actions and lacks common mechanisms for identifying and assessing risks. This deficiency in robust, uniform risk assessment frameworks leaves destinations without clear guidance on how to prepare for unforeseen events.

[Why?]

Such a common framework could provide well-defined common tools, along with a step-by-step guide for destination management organisations and tourism businesses across the EU. It would expand the learning material created by this current project for the EU Academy. It would assist in **identifying potential risks, assessing their impacts, and developing mitigation strategies**, significantly enhancing the ecosystem's preparedness. The framework could help destinations to start considering and implementing crisis preparedness measures and resilience building, by enabling comparability and promoting the design and sharing of proactive measures. It would better address crisis management needs if they arise, in order to minimise disruptions to tourism activities and strengthen resilience.

Furthermore, this framework has the potential to be replicated across other industries, extending its use and benefits beyond the tourism ecosystem.

[High-level implementation steps and options]

*Develop a Common Framework*

- Launch a study or pilot action to establish a common framework with criteria and methodologies to identify and assess risks in tourism.
- Leverage the framework developed and experiences collected under the Crisis Management and Governance in Tourism Project.

*Define how such a framework should work and how it could be facilitated to be used by the tourism ecosystem in collaboration with stakeholders*

- Identify and define the most effective and efficient way to facilitate the use of the framework (e.g., user-friendly digital website, training), allowing easy access for tourism stakeholders.
- Define how tourism ecosystem stakeholders could conduct regular risk assessments to identify potential risks, evaluate their likelihood and impact, and design appropriate mitigation measures.
- Define how to include comprehensive guidelines on using the framework, including best practices for identifying and assessing risks, as well as for developing mitigation strategies.

Create a common framework to support tourism destinations and businesses in assessing and sharing information about risks and mitigation measures and facilitate broad uptake of such a tool	
	<ul style="list-style-type: none"> <li>Define how to associate an intelligence centre with the overall results of the assessments and with dashboards for users to analyse risks and mitigation measures identified by others with similar profiles. This would facilitate peer learning.</li> </ul>
[Time Bound]	Short-term
[Effort]	Moderate Effort

Ensure the preparedness of Re-open EU platform and mobile App to be relaunched as a one-stop shop for EU crisis communications, if needed, to provide information to travellers and tourism businesses	
[Level]	European
[To whom is it addressed]	European Commission
[Who should be involved]	National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO), Professional Associations, Tourism Businesses (SMEs), Tourists

**Clear communication channels and access to accurate information are critical needs for the tourism ecosystem to effectively respond and recover from future crisis events.** In times of crisis, transparent communication ensures that relevant information reaches all stakeholders, including government authorities, tourism businesses, and tourists. It also enables the dissemination of vital updates, safety protocols, and travel advisories, allowing businesses to adapt their operations and to make informed decisions.

The "Re open EU" platform (website and mobile app) was established to provide **up to date information on travel and tourism restrictions** within the EU, during the COVID-19 pandemic. It was discontinued in July 2023 when the Regulation on EU DCC expired.

[Why?]	<p>The platform was created to <b>help travellers navigate the evolving situation and make informed decisions about their journeys</b>. Its primary goal was to provide <b>transparent and reliable information on travel restrictions, health and safety measures</b>.</p> <p><b>The platform could be leveraged and extended in its aim and scope.</b> While the platform operation is currently discontinued, it could be re-activated in case of need to become a <b>one-stop shop</b> for all pertinent information related to crisis events. It could be consulted not only by travellers, but also by tourism organisations and businesses, making available at EU level information relating to official measures, directly provided by national or regional authorities.</p>
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**Ensure the preparedness of Re-open EU platform and mobile App to be relaunched as a one-stop shop for EU crisis communications, if needed, to provide information to travellers and tourism businesses**

<p>[High-level implementation steps and options]</p>	<p><i>Define the platform's expansion objectives and scope</i></p> <ul style="list-style-type: none"> <li>• Review feasibility to revise the objectives and scope of the platform. Review how the platform's operational model should be revised to ensure the latest data from national or regional authorities is included.</li> <li>• Engage with tourism businesses and tourism organisations to define key types of information to be included, which would be valuable to them, such as:             <ul style="list-style-type: none"> <li>○ Travel restrictions.</li> <li>○ Regulatory rules and guidelines.</li> <li>○ Health and safety protocols for travellers and tourism businesses.</li> <li>○ Crisis-related government policies and directives.</li> <li>○ Support and funding options, including information on how to apply for assistance in the event of a crisis.</li> <li>○ Relevant news updates and developments regarding the crisis.</li> <li>○ Tips and resources for crisis mitigation and recovery.</li> <li>○ Other essential information relevant to informed decision-making in crisis situations.</li> </ul> </li> </ul> <p><i>Assess and upgrade technical infrastructure</i></p> <ul style="list-style-type: none"> <li>• Assess the needs to develop the existing technical infrastructure to implement a broader operational scope, the need to update outdated components, and how to ensure that the platform could be launched if needed with minimal delay.</li> <li>• Develop and integrate tools that automatically check the consistency and accuracy of the information.</li> <li>• Develop mechanisms that update information automatically from a specified list of authoritative websites where Member States and other relevant entities publish updates.</li> <li>• Develop mechanism to check information with Member States' authorities in case of unclarities, for example regarding automatic translations.</li> </ul> <p><i>Ensure cooperation and commitment from national governments, tourism authorities, and other relevant stakeholders in the event of a crisis</i></p> <ul style="list-style-type: none"> <li>• Develop an agreement with all Member States to guarantee the continuous and timely sharing of relevant information in the event of a crisis, with dedicated responsible contact points.</li> <li>• Explore options for each type of information provided on the platform to establish API for information updates from Member States, regional actors and other identified stakeholders.</li> </ul> <p><i>Communication</i></p> <ul style="list-style-type: none"> <li>• If a crisis hits, launch a communication campaign to inform stakeholders of the re-launch and new functionalities of the Re-open EU platform, together with the new audiences and information covered.</li> <li>• Ensure the platform supports multiple communication channels, including alerts, newsletters, and social media integration, for real-time updates.</li> </ul>
	<p>[Time Bound]</p>
<p>[Effort]</p>	<p>Moderate Effort</p>

<b>Develop a pilot project to implement a Tourism Resilience and Crisis Preparedness Innovation Lab, consortium uniting research institutes and startups developing and testing innovative solutions which could be established a long-term policy support mechanisms for crisis management in tourism</b>	
[Level]	European
[To whom is it addressed]	European Parliament
[Who should be involved]	European Commission, Universities, Polytechnic schools and Tourism related startups, Destination Management Organisations, Professional Associations, Tourism Businesses, National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO), Tourism Clusters and Networks

To address the **gap in resilience and crisis management research and innovation within tourism**, we recommend developing a project to test the implementation of an EU Tourism Resilience and Crisis Preparedness Innovation Lab. This will be potentially useful in the support of tourism policy, through continuously monitoring crisis resilience and developing new approaches and initiatives for implementation across the EU tourism ecosystem.

[Why?]

This lab would bring together academia, startups, and tourism stakeholders to combine research with practical solutions, creating innovative tools for crisis preparedness and management. The hub could foster collaboration that produces effective, real-world solutions, by integrating academic research with the agility of startups. Universities would provide theoretical knowledge while startups offer practical applications, ensuring comprehensive and actionable responses to crises.

It would also facilitate the real-world testing of solutions, ensuring they meet the practical needs of tourism destinations and businesses. This ongoing research and development would keep the sector's tourism and crisis management strategies relevant and effective.

The innovation lab can generate new tourism products and services, crisis preparedness and management solutions, mechanisms, tolls and frameworks. It has the potential to be further developed and replicated across the EU tourism ecosystem.

[High-level implementation steps and options]	<p><i>Conduct the initial assessment and scoping</i></p> <ul style="list-style-type: none"> <li>• Identify and analyse existing gaps in resilience and crisis management within the EU tourism sector to establish a clear understanding of the challenges that need to be addressed.</li> <li>• Define the primary objectives, expected outcomes, and scope of the pilot project, ensuring they align with the overall goals of enhancing crisis resilience and fostering innovation in the EU tourism ecosystem.</li> <li>• Organise discussions with stakeholders to reflect whether that initiative would meet their needs and could be proposed as a pilot for developing tourism policy in the area of crisis management.</li> </ul> <p><i>Propose Innovation Lab as a policy pilot action</i></p> <ul style="list-style-type: none"> <li>• Outline the primary objectives of the Innovation Hub, focusing on enhancing crisis resilience, fostering innovation, and improving knowledge transfer between academia and the tourism industry.</li> </ul>
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**Develop a pilot project to implement a Tourism Resilience and Crisis Preparedness Innovation Lab, consortium uniting research institutes and startups developing and testing innovative solutions which could be established a long-term policy support mechanisms for crisis management in tourism**

	<p>Develop a roadmap with both short-term and long-term goals, including key milestones for tracking progress.</p> <ul style="list-style-type: none"> <li>• Propose the PP for the European Commission.</li> <li>• If implemented, follow the activity of the Innovation Lab and identify its role for tourism policy and the potential need for longer-term action.</li> </ul>
[Time Bound]	Long-term
[Effort]	Moderate Effort

**Implement long-term technical assistance offer to support destination and tourism ecosystem stakeholder to build resilience and crisis preparedness**

[Level]	European
[To whom is it addressed]	European Commission
[Who should be involved]	National Tourism Authorities (NTA), Regional Tourism Authorities (RTA), National Tourism Organisations (NTO), Professional Associations, Tourism Businesses (SMEs), Regional and Local Destination Management Organisations (DMO), Tourism Experts, European Clusters and Networks (EEN)

It was noticeable in this project that destinations and **tourism ecosystem stakeholders do not have the skills, the expertise nor the resources** (personnel, funding, time) **to proactively develop and implement resilience and crisis preparedness and management initiatives.**

[Why?]

While this project was very important to introduce crisis management topics and develop an action plan to improve crisis management preparedness, the beneficiaries would have greatly benefited from extended support, to ensure the effective implementation of the action plan.

For that reason, it is recommended that the European Commission implement a long-term technical assistance offer to support destination and tourism ecosystem stakeholders in both the design and implementation of resilience and crisis preparedness initiatives.

[High-level implementation steps and options]	<p><i>Assess needs and stakeholder engagement</i></p> <ul style="list-style-type: none"> <li>• Conduct a comprehensive needs assessment to identify the specific skills, expertise, and resources gaps in resilience building, crisis preparedness and management among tourism destinations and ecosystem stakeholders.</li> <li>• Involve key stakeholders, including TAC members, tourism boards, local governments, industry associations, experts, etc. to gather input and ensure their buy-in through consulting with the T4T expert group and the EU Tourism platform.</li> </ul>
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**Implement long-term technical assistance offer to support destination and tourism ecosystem stakeholder to build resilience and crisis preparedness**

*Design and plan the technical assistance offer*

- Establish specific and clear objectives and goals.
- Outline the long-term vision, key activities, timeline, and expected outcomes.
- Define the range of support to be offered.
- Establish the funding base such as SMP call for a consortium that supports the offer across multiple years for actors in all EU Member States, or link it with existing mechanisms such as Enterprise Europe Network (EEN).
- Ensure that the selected mechanism provides the technical assistance offers available via regular open calls to tourism stakeholders to implement initiatives for resilience building, crisis preparedness and management.

*Establish a mechanism to regularly monitor and evaluate reach and results of the technical assistance*

- Establish a set of indicators to evaluate the reach of the offer towards different types of tourism actors in high-risk regions.
- Regularly monitor the efficiency and effectiveness of the technical support provided to develop resilience and crisis management preparedness.

[Time Bound]

Short-term

[Effort]

Moderate Effort

**Leverage EU digital innovation hubs to develop and deliver data literacy training for tourism management organisations and SMEs to improve their understanding of the existing data sources, indicators, tools and systems and of their use and limitations**

[Level]

European

[To whom is it addressed]

European Commission, EDIHs

[Who should be involved]

National Tourism Authorities (NTA), Regional Tourism Authorities (RTA), National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO), Professional Associations, Tourism Businesses (SMEs)

[Why?]

There is a significant **lack of skills and awareness among stakeholders in the tourism ecosystem regarding the use of data for tourism development, resilience building and crisis preparedness.**

The lack of knowledge about how to interpret data insights in order to support informed decision-making processes hinders stakeholders from fully leveraging data-driven approaches to enhance crisis management and strategic planning and tourism activity monitoring.

For these reasons, it is important to develop and deliver a data literacy program to ensure that public and private tourism organisations have the appropriate understanding of the existing data sources, indicators, tools and systems and of their use and limitations.

European Digital Innovation Hubs (EDIHs) are one-stop shops supporting companies and public sector organisations to respond to digital challenges, such as this one, helping them become more competitive. EDIHs combine the

**Leverage EU digital innovation hubs to develop and deliver data literacy training for tourism management organisations and SMEs to improve their understanding of the existing data sources, indicators, tools and systems and of their use and limitations**

benefits of a regional presence with the opportunities made available by a pan-European network.

This regional presence across Europe and their scope of action make them well-placed to develop and deliver the data literacy training and services that tourism organisations need.

<p>[High-level implementation steps and options]</p>	<p><i>European Commission to engage EDIHs whose focus is data, big data and tourism</i></p> <ul style="list-style-type: none"> <li>• Identify and engage with EDIHs whose focus and area of expertise is relevant for data literacy, for crisis management, and for the tourism ecosystem.</li> <li>• Incentivise them to develop and offer tailored data literacy training programmes, workshops, mentorships and technical expertise to tourism organisations.</li> </ul> <p><i>European Commission to promote data literacy training and material within the tourism ecosystem</i></p> <ul style="list-style-type: none"> <li>• Promote the availability of the training, services and material provided by EDIHs.</li> <li>• Incentivise tourism organisations and businesses to reach out to EDIHs.</li> </ul> <p><i>EDIHs to provide training for the EU tourism ecosystem (public and private organisations)</i></p> <ul style="list-style-type: none"> <li>• Develop a comprehensive curriculum covering the basics of data literacy, including understanding data sources, indicators, tools, systems, and their use and limitations.</li> <li>• Develop training on big data analytics, correlation of data and predictive models for more mature businesses and organisations.</li> <li>• Incorporate practical modules on data collection, data analysis, data interpretation and data application in crisis preparedness and strategic planning.</li> <li>• Develop user-friendly training material, such as guides, manuals and online courses, and video tutorials, and make them available at EU academy, in the Knowledge Hub of the EDIH Network Website and in the EU Tourism Platform.</li> </ul> <p><i>EDIHs to offer technical assistance and support for the EU tourism ecosystem</i></p> <ul style="list-style-type: none"> <li>• Offer continuous support through mentorship programmes to assist stakeholders in applying their data literacy skills.</li> <li>• Support tourism organisations in the development and implementation of their data collection and analysis tools and platforms.</li> </ul>
<p>[Time Bound]</p>	<p>Short-term</p>
<p>[Effort]</p>	<p>Moderate Effort</p>



Enhance Eurostat’s tourism data offer with improved timeliness, frequency, coverage and usability, building on collaboration with National Statistical Institutes and tourism authorities in the Member States	
[Level]	European
[To whom is it addressed]	European Commission, Eurostat, National Tourism Statistics Institutes (NSIs), Other National Authorities (ONAs), European Statistical System Committee (ESSC)
[Who should be involved]	National and Regional Governments, National Tourism Organisations (NTO), Regional and Local DMOs, Professional Associations, Tourism Businesses

Eurostat is a vital source of publicly available tourism data within the EU, widely trusted for its reliability and comparability across destinations. However, **tourism stakeholders have expressed that they would need more diverse, granular and timely data than that currently available.**

The data harmonisation and quality assurance mechanism of the European Statistical System (ESS) cause **delays to the data publication by Eurostat**, which reduces the data’s value for real-time decision-making. Also, the **long intervals between the data updates** (typically monthly, quarterly, or annual) reduce the timeliness and usefulness of the data for stakeholders to navigate crisis events. Furthermore, data is often not available at NUTS3 regional level, but only at the national (NUTS0) level.

[Why?]

Furthermore, **Eurostat’s current data set does cover all sectors within the tourism ecosystem**. Key sectors such as cruise tourism and exhibitions are not represented in the NACE.rev2 classifications agreed at EU level for use for data collection and publication by Eurostat. Furthermore, the **data often cannot be separately viewed for tourism ecosystem**, but is joined together with other services, or is only available for accommodation and food services and air transport. This reduces the usefulness of EU-level data for tourism actors.

Addressing these issues, would significantly enhance the role of Eurostat in supporting the tourism ecosystem with timely, granular and actionable data, improving decision-making and crisis preparedness and management.

[High-level implementation steps and options]	<p><i>Consultation of stakeholders (e.g., destination management organisations, tourism professional associations and tourism stakeholders) to identify data needs and challenges currently not addressed by ESS</i></p> <ul style="list-style-type: none"> <li>• Create a working group with NSIs to analyse the possibility of adding new tourism indicators and improving the granularity of already existing data, and any justification on a cost-effectiveness basis.</li> <li>• Present the results at the ESSC forum.</li> <li>• Organise a public consultation and actively encourage tourism actors across the EU to share their suggestions regarding the results of the first analysis.</li> <li>• Suggest changes to EU-level regulations on tourism relevant statistics based on the results from collaboration with NSIs and public consultation.</li> </ul>
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**Enhance Eurostat’s tourism data offer with improved timeliness, frequency, coverage and usability, building on collaboration with National Statistical Institutes and tourism authorities in the Member States**

*Extend and improve the Eurostat data exploration platform towards data analysis*

- Review the possibilities to redesign the Eurostat platform or to create a new one, which would have improved ease of navigation and accessibility also for persons with low data literacy, possibly with the use of an AI-supported prompt-based user interface.
- Introduce data analysis and visualisation tools to aid users in interpreting complex data and combine data from different data sets to create new insights. This could include incorporating AI-based user assistance to facilitate data analysis and exploration.

[Time Bound]

Long-term

[Effort]

High Effort

**Identify data available at national and regional levels in a comparable manner across several EU Member States and include it on the EU Tourism Dashboard to improve EU-level data availability for tourism development and policy monitoring for improving crisis preparedness and management**

[Level]

European

[To whom is it addressed]

European Commission

[Who should be involved]

National Tourism Statistics Institutes (NSIs), Other National Authorities (ONAs), Eurostat, National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO), Professional Associations, Tourism Businesses, Data Providers

The beneficiaries also highlighted during the project the need to have available data at **EU level which does not come from National Statistical Institutes**, such as that on bookings, financial transactions (payments and withdrawals with foreign credit cards).

[Why?]

The EU Tourism Dashboard is an online knowledge tool developed by the European Commission, aimed at promoting and monitoring the green and digital transitions and socio-economic resilience factors of the European tourism ecosystem. It offers the visualisation of tourism-relevant data and indicators collected from available, trusted sources concerning the tourism ecosystem. This enables the profiling and monitoring of the progress of EU countries towards EU policy objectives.

The **EU Tourism Dashboard**, contrary to Eurostat, **is not bounded by national and European statistics regulations**. It is the ideal setting to aggregate other existing national and regional data sources to drive more intelligence in the tourism ecosystem. Therefore, it could serve to gather and present at EU level other types of important data for monitoring tourism activity, supporting decision-making, and enhancing the capacity to prepare for, respond to, and recover from crisis events.

<p><b>Identify data available at national and regional levels in a comparable manner across several EU Member States and include it on the EU Tourism Dashboard to improve EU-level data availability for tourism development and policy monitoring for improving crisis preparedness and management</b></p>	
<p>[High-level implementation steps and options]</p>	<p><i>Identify data that is currently available for all Member States at national and/or regional level</i></p> <ul style="list-style-type: none"> <li>• Engage with destination management organisations, tourism professional associations and tourism stakeholders (this can be leveraged by the expansion of the suggested data sources for NTOs and regional DMOs).</li> <li>• Engage with European and international organisations such as ETC, OECD, UN Tourism, WTTC.</li> <li>• Engage with NSIs and ONAs (social security, finance, other governmental statistics).</li> </ul> <p><i>Assess the information collected and define the data to be added on the EU Tourism Dashboard</i></p> <ul style="list-style-type: none"> <li>• Organise a consultation with the Tourism Advisory Committee and T4T expert group to collect well-defined ideas for possible additional EU-level data that could be published on the Dashboard.</li> <li>• Identify and access the data needs of tourism stakeholders and consider the feasibility aspect: what data could be received from public sources or with licensing agreements, which could be made publicly available for tourism stakeholders across the EU.</li> <li>• Examples of possible data to be added include:             <ul style="list-style-type: none"> <li>○ Trends, sentiment analysis, social media and online search: tourists’ drivers and preferences, social media monitoring, tourism confidence indicators, intention to travel, search volume for specific topics/key words.</li> <li>○ Airport information: passenger flows.</li> <li>○ Bookings: reservations for the following months of hotels, short term accommodation, flights and cruises.</li> <li>○ Transaction data: payments using foreign credit cards.</li> <li>○ Mobility data: data about mobility and flows.</li> <li>○ Telecom data: data regarding communications.</li> </ul> </li> </ul> <p><i>Prepare an action plan, explore the technical feasibility, and update the EU Tourism Dashboard with new indicators</i></p> <ul style="list-style-type: none"> <li>• Engage with data providers to establish partnerships for regular data collection and publication on an open platform.</li> <li>• Establish the technical infrastructure required to automatically gather high-quality data from providers and transform it into publishable suggested indicators.</li> </ul>
<p>[Time Bound]</p>	<p>Medium-term</p>
<p>[Effort]</p>	<p>High Effort</p>

### iii. Policy recommendations for Professional Associations

**Engage in the horizontal and vertical tourism management structures established for the countries/region/cities to support collaborative tourism governance and to build resilience and develop crisis preparedness and management in the EU tourism ecosystem**

[Level]	European
[To whom is it addressed]	Professional Associations
[Who should be involved]	Tourism Businesses, EU Commission, National Tourism Organisations (NTO), Regional and Local Destination Management Organisations (DMO)

**Enhancing collaboration between the public and private sector is essential for building resilience and improving crisis preparedness** within the EU Tourism Ecosystem. Strong cooperation is necessary to navigate the complexities of the ecosystem, particularly in periods of crisis.

**Professional associations** at both national and European levels play a crucial role in this collaborative field, **bridging the public and private sector** as 1) key advocates and representatives of the various sectors of the tourism ecosystem and 2) coordinators and guides to support businesses in implementing the policy developed by the public sector.

[Why?]

The role of professional associations becomes even more critical **during crises**, as they **facilitate collaboration between the tourism industry and public institutions**. Their ability to coordinate efforts and represent the industry's interests ensure the sector can respond effectively to challenges and safeguard its future.

Therefore, it is important that professional associations ensure enhanced collaboration with the public sector to build the resilience and long-term sustainability of the EU Tourism Ecosystem.

[High-level implementation steps and options]

*Ensure and reinforce the necessary coordination with the public sector (EU Commission, NTO, Regional DMO)*

- Ensure coordination and communication channels are established.
- Ensure that professional associations take part in the tourism resilience and crisis preparedness and management coordination structures at national and EU level.
- Enhance information sharing mechanisms with the public sector to ensure the timely and accurate dissemination of relevant data, legislative updates, and crisis information.
- Offer feedback on existing policies to ensure that professional associations' perspectives are considered in policy development and implementation.
- Create collaborative action plans that detail specific areas of cooperation, including crisis management strategies, legislative advocacy, and policy implementation support.
- Work together to design comprehensive crisis preparedness and management frameworks that outline roles, responsibilities, and procedures for both public and private sector stakeholders.

**Engage in the horizontal and vertical tourism management structures established for the countries/region/cities to support collaborative tourism governance and to build resilience and develop crisis preparedness and management in the EU tourism ecosystem**

*Collaborate with the public sector (EU Commission, NTO, Regional DMO) to develop and implement initiatives in the areas of resilience building and crisis preparedness*

- Encourage businesses to actively engage in initiatives led by destination management organisations, ensuring their contribution to building local resilience.
- Support businesses to develop and update their crisis management plans to ensure they are adequately prepared for potential disruption.
- Ensure businesses implement strategies outlined by destination management organisations. For example, develop new products to diversify their offer and the source markets, contributing to the reduction of destination vulnerabilities.
- Actively participate in the EU Tourism platform.

*Share data and insight about the sector with destination management organisations*

- Provide sector specific data to the public sector to improve the visibility and overall understanding of the different sectors of the tourism ecosystem and support better informed decision-making and policy development.

[Time Bound]

Short-term

[Effort]

Moderate Effort

**Create a dedicated resilience and crisis management team that supports sector’s tourism businesses at EU, national, regional and local levels (as relevant) in developing improved resilience, crisis preparedness, and effective crisis management strategies**

[Level]

European

[To whom is it addressed]

Professional Associations

[Who should be involved]

Tourism Businesses

The tourism ecosystem comprises various sectors, each with unique needs and challenges. Many of these businesses are **SMEs with limited capacity to develop robust resilience and crisis preparedness strategies**. To address these specificities and provide targeted support, it is crucial for leading tourism professional associations—such as HOTREC, CLIA, ETOA, and EEIA—to establish dedicated resilience and crisis management teams within their sectors.

[Why?]

These sector-specific teams would coordinate efforts and tailor support to the unique requirements of their respective sectors. These teams can offer specialised guidance, resources, and training, by leveraging their in-depth understanding of sector-specific challenges. This approach ensures that businesses receive relevant and actionable support, enhancing their ability to effectively manage and recover from crises.

**Create a dedicated resilience and crisis management team that supports sector's tourism businesses at EU, national, regional and local levels (as relevant) in developing improved resilience, crisis preparedness, and effective crisis management strategies**

<p>[High-level implementation steps and options]</p>	<p><i>Initial assessment and planning</i></p> <ul style="list-style-type: none"> <li>Engage with tourism businesses to identify their needs to build resilience, crisis preparedness and management, in order to define the main areas of focus of this group.</li> </ul> <p><i>Set up the resilience and crisis management team</i></p> <ul style="list-style-type: none"> <li>Select from within the association a diverse group of professionals with expertise in resilience and crisis management and a deep understanding of sector-specific issues.</li> <li>Define clear roles within the teams, including team leads, coordinators, and specialists.</li> <li>Assign responsibilities based on individual expertise and sector needs.</li> </ul> <p><i>Provide guidance and coordinated effort to enhance the overall stability and responsiveness of the tourism sector</i></p> <ul style="list-style-type: none"> <li><b>Risk Assessment and Planning:</b> Support members conducting risk assessments to identify potential threats and vulnerabilities within the tourism sector. Develop tailored resilience building and crisis preparedness plans and guidelines for associations.</li> <li><b>Support and Guidance:</b> Offer ongoing support and guidance to members to develop their own resilience and crisis management plans. Provide templates, best practices, and consultancy services.</li> <li><b>Communication and Advocacy:</b> Serve as a liaison between professional associations, government bodies, and international organisations to advocate for necessary resources, policy changes, and support in times of crisis.</li> <li><b>Crisis Response Coordination:</b> Establish a centralised crisis response centre to coordinate action during crises. Ensure clear communication channels and protocols are in place for efficient information dissemination and decision-making.</li> </ul> <p><i>Foster Inter-Association Collaboration</i></p> <ul style="list-style-type: none"> <li>Collaborate with other different associations to share best practices and what they have learnt. This could involve, for example, joint training sessions or sharing resources.</li> </ul>
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<p>[Time Bound]</p>	<p>Medium-term</p>
<p>[Effort]</p>	<p>Moderate Effort</p>

Develop guidelines to improve the resilience and crisis preparedness of the tourism businesses in the sector, with examples to address common risks and vulnerabilities	
[Level]	European
[To whom is it addressed]	Professional Associations
[Who should be involved]	Tourism Businesses
[Why?]	<p>The tourism industry is <b>particularly susceptible to a variety of crises</b>, ranging from natural disasters and pandemics to political instability and economic downturns. These events can disrupt operations, endanger staff and visitors, and lead to significant financial losses. Therefore, having well-structured guidelines provides businesses with a clear roadmap on how to anticipate, mitigate, prepare for, and respond to such crises. This will minimise disruption and ensure a faster recovery.</p> <p>Moreover, guidelines foster a sense of uniformity and coherence across the tourism sector. When businesses, regardless of their size or location, follow standardised procedures and protocols, the entire ecosystem becomes more resilient. This consistency is vital, especially in times of crisis, as it ensures that all players are on the same page, facilitating smoother coordination and collaboration.</p> <p>These guidelines are particularly invaluable for SMEs, which often lack the resources and expertise to develop comprehensive crisis management plans on their own. They provide a foundation upon which these businesses can build their own tailored strategies, thus levelling the playing field.</p>
[High-level implementation steps and options]	<p><i>Develop Resilience and Crisis Management Guidelines</i></p> <ul style="list-style-type: none"> <li>• Create sector specific guidelines and standard operating procedures for preventing, preparing and managing crisis, leveraging existing tourism crisis management guidelines.</li> <li>• Develop/Adapt and provide access to tools, templates, and checklists for resilience building and crisis preparedness and response.</li> </ul> <p><i>Develop/adapt and share ready to use templates and material</i></p> <ul style="list-style-type: none"> <li>• Framework for businesses to conduct thorough risk assessments tailored to their specific operations. This includes identifying potential crisis scenarios, evaluating their impact, and ascertaining the likelihood of occurrence.</li> <li>• Framework for SWOT analysis exercises.</li> <li>• Guidelines for developing crisis management plans.</li> <li>• Guidelines for developing crisis communication plans.</li> <li>• Develop a manual to support members to make use of the available tools.</li> </ul>
[Time Bound]	Short-term
[Effort]	Low Effort

**Improve the skills of managers, employees and entrepreneurs on risk preparedness and management with trainings tailored to the sector, with relevant scenario exercises**

[Level]	European
[To whom is it addressed]	Professional Associations
[Who should be involved]	Tourism Businesses, EU Commission, National Tourism Organisations (NTO), Regional Destination Management Organisations (DMO)

Tourism businesses must be better equipped and prepared with the necessary skills and knowledge to build resilience and effectively manage future crises. This is particularly important for SMEs, which often lack expertise and training in these areas due to limited resources - this issue is of concern, considering they form the backbone of the industry.

[Why?]	<p>In addition to crisis management, tourism businesses need to build capacity in other critical areas, such as digitalisation, sustainability, and core functions like product development, marketing, finance, and operational efficiency. They also require improved access to data and more comprehensive information about trends and challenges impacting their destinations.</p> <p>Professional associations should address these needs and provide training, tools, and resources to capacitate tourism businesses.</p>
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[High-level implementation steps and options]	<p><i>Assess the needs of tourism businesses</i></p> <ul style="list-style-type: none"> <li>Assess the specific skills gaps, training needs, and resource limitations faced by tourism businesses, especially SMEs.</li> </ul> <p><i>Create comprehensive training programmes tailored to address the needs identified and improve the industry's overall capacity</i></p> <ul style="list-style-type: none"> <li>Design a training framework that outlines the key topics, learning objectives, and delivery methods.</li> <li>Include a combination of classroom-based sessions, online modules, interactive workshops, case studies, mentoring programmes, and networking events.</li> <li>Allocate the necessary resources, including funding, trainers, and material, to support capacity-building. Explore public funding opportunities and grants to support training and capacity-building initiatives.</li> <li>Develop comprehensive toolkits, guidelines, and best practices manuals covering critical areas such as digital transformation, sustainability, and crisis management.</li> <li>Pair experienced industry professionals with SMEs to provide one-on-one mentoring and coaching.</li> </ul> <p><i>Monitor and evaluate</i></p> <ul style="list-style-type: none"> <li>Develop a set of indicators to evaluate the effectiveness of the capacity building activities (e.g. digital maturity).</li> </ul>
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[Time Bound]	Short-term
[Effort]	Moderate Effort



**Raise awareness of the importance of resilience building among all members by including resilience building and crisis preparedness as part of regular communications, conferences and events to the sector**

[Level]	European
[To whom is it addressed]	Professional Associations
[Who should be involved]	Tourism Businesses, EU Commission, National Tourism Organisations (NTO), Regional Destination Management Organisations (DMO)

[Why?]

Raising awareness of resilience building and crisis preparedness in the tourism ecosystem is crucial because the industry is highly vulnerable to disruptions, such as natural disasters, pandemics, political instability, and economic downturns. By integrating these topics into regular communications, conferences, and events, stakeholders, including businesses, governments, and communities, can be better prepared to face unexpected challenges. This proactive approach helps to minimise the impact of crises, ensuring that the industry can recover more quickly and effectively.

Furthermore, fostering a culture of resilience encourages collaboration among all members of the tourism sector, from managers and entrepreneurs to employees. When everyone is aware of the importance of resilience, they are more likely to work together to develop contingency plans, share best practices, and support each other during difficult times. This collective preparedness strengthens the entire ecosystem, making it more sustainable and adaptable in the face of future crises.

[High-level implementation steps and options]

*Create targeted communication strategies to increase awareness of resilience building and crisis preparedness*

- Use newsletters, social media, websites, and press releases to promote the importance of resilience.
- Share real-world examples and success stories of businesses that have effectively managed crises.
- Develop easy-to-understand infographics, videos, and articles to explain key resilience concepts.
- Include crisis preparedness messages in regular industry communications.

*Make resilience and crisis preparedness a focal point of tourism industry conferences, seminars, and events*

- Dedicate sessions and panels at major tourism conferences to resilience topics.
- Host workshops, scenario exercises, and simulations that allow participants to practice crisis response.
- Invite resilience experts and crisis management professionals to present and lead discussions at events.
- Partner with local governments and organisations to co-host resilience-themed events.

**Raise awareness of the importance of resilience building among all members by including resilience building and crisis preparedness as part of regular communications, conferences and events to the sector**

*Ensure ongoing learning opportunities and access to resilience-building resources*

- Create an online hub or resource centre where tourism stakeholders can access toolkits, guidelines, and case studies related to crisis management and resilience.
- Offer webinars, online courses, and podcasts focusing on various aspects of resilience building.
- Encourage peer learning by facilitating knowledge-sharing platforms, such as forums or discussion groups.

[Time Bound]

Short-term

[Effort]

Moderate Effort

**Establish a data resource available to members on sector-relevant data, and make as much data as possible available publicly, to support tourism resilience building at different destinations**

[Level]

European

[To whom is it addressed]

Professional Associations

[Who should be involved]

Tourism Businesses

While Eurostat and other public sources provide valuable data, there is a significant **gap in sector-specific metrics that are important for detailed analysis and informed decision-making within individual tourism sectors.**

Sector associations, with their extensive networks and direct access to relevant member data, are uniquely positioned to address this gap. These associations can gather and share specialised information tailored to their sectors, by establishing open data platforms. These will complement and enrich existing public data sources.

[Why?]

This enhanced level of detail would enable more accurate benchmarking and facilitate comparability within the sector, supporting tourism businesses in making well-informed decisions and providing more nuanced insights into the dynamics of the tourism ecosystem.

Ideally, the sector-specific data collected through this platform should be made public or made available through specific agreements. This will benefit the entire tourism ecosystem, and thereby contribute to the Tourism Data Space. This data sharing approach would enhance the ability of destination managers and other stakeholders to use the data for strategic planning, crisis management, and sector development, ultimately strengthening the resilience of the tourism ecosystem.

**Establish a data resource available to members on sector-relevant data, and make as much data as possible available publicly, to support tourism resilience building at different destinations**

[High-level implementation steps and options]

*Assess the data needs of members*

- Conduct a thorough needs assessment within the sector to identify the specific data requirements and challenges faced by their members.

*Identify the available indicators to be collected from among members*

- Review and catalogue the indicators available and the willingness of the members of the association to share them.

*Establish the set of indicators to be included in the platform*

- Create a curated set of indicators to be included on the platform, based on the needs identified and the available indicators.
- Establish criteria for data collection and ensure that all indicators are designed to be anonymised to protect sensitive information while providing valuable insights.

*Develop the data platform and collect, analyse and develop insights that are relevant to members*

- Design and build a user-friendly digital platform that supports the collection, storage, and dissemination of anonymised sector-specific data.
- Develop features that allow stakeholders to easily access, navigate, and interact with the data, including tools for data visualisation and reporting.
- Implement analytics tools on the platform to generate actionable insights from the collected data.
- Develop reports and visualisations that highlight significant findings and support informed decision-making.

*Share the insights with members and ideally with the tourism ecosystem*

- Disseminate the insights and reports to sector members to keep them informed.

*Capacitate the sector for data usage*

- Provide training and support to sector businesses to enhance their ability to effectively use the data and insights available on the platform.
- Develop user guides, tutorials, and best practice material to assist stakeholders in navigating the platform and interpreting the data.

[Time Bound]

Medium-term

[Effort]

High Effort

**Develop openly available learning material for the sector about available data sources and how to use them for developing their tourism activities and for recognising issues to be addressed for better resilience**

[Level]	European
[To whom is it addressed]	Professional Associations
[Who should be involved]	Tourism Businesses

[Why?]

Developing openly available learning material on data sources is essential for improving crisis management in the tourism ecosystem because data-driven insights are crucial for informed decision-making. By equipping tourism stakeholders with the knowledge of available data and how to use it, businesses and organisations can better anticipate challenges, identify emerging trends, and respond proactively to potential crises. Access to relevant data can help tourism operators assess risks, optimise their operations, and adapt to changing circumstances, enhancing overall resilience in the sector.

Moreover, making this learning material openly accessible ensures that all tourism stakeholders, including small and medium-sized enterprises (SMEs), have equal opportunities to benefit from data-driven strategies. SMEs often lack the resources to independently gather and analyse data, so providing free, accessible learning tools empowers them to strengthen their operations and crisis preparedness. This collective increase in resilience across the entire ecosystem not only benefits individual businesses but also helps safeguard the long-term sustainability of the tourism industry as a whole.

[High-level implementation steps and options]

*Develop learning resources that explain the various data sources and how to leverage them effectively for tourism activities and resilience building*

- Design a training framework that outlines key data topics such as data collection, analysis, and application in tourism.
- Create diverse formats of learning material, including:
  - **Guides and Manuals:** Step-by-step guides on accessing and using tourism-related data.
  - **Interactive Online Modules:** Self-paced courses or tutorials that cover data usage, analysis tools, and real-world applications in tourism.
  - **Case Studies:** Real-life examples showing how data-driven decisions have led to improved resilience and business growth in tourism.
  - **Video Tutorials and Webinars:** Easy-to-follow video content that walks users through the process of leveraging specific data sources.
  - **Data Source Directories:** Curated lists of key public and private data sources relevant to tourism, along with explanations on how to use them.
- Ensure that all materials are accessible to a wide audience, including non-experts, and provide translations if necessary to reach a broader audience.

**Develop openly available learning material for the sector about available data sources and how to use them for developing their tourism activities and for recognising issues to be addressed for better resilience**

*Partner with data experts, academic institutions, and government agencies to develop and validate the content*

- Work with data analysts, tourism researchers, and statisticians to ensure accuracy and relevance.
- Collaborate with local tourism boards, universities, and government agencies to gather regional data and insights.
- Leverage partnerships with tech companies and data platforms to provide specialised tools and software for data analysis in tourism.

*Ensure that the developed material is freely accessible to all stakeholders in the tourism sector*

- Host the material on a dedicated online platform, such as a resource hub, which is easy to navigate and open to all users.
- Distribute material via industry associations, tourism boards, and government websites.
- Promote the material through newsletters, social media, and e-mail campaigns to ensure a broad reach.
- Organise periodic virtual events, such as live Q&A sessions and forums, to engage users and encourage interaction with the content.

*Provide additional support to small and medium-sized enterprises (SMEs) that may lack the expertise or resources to fully use data*

- Offer one-on-one mentoring or coaching from data experts who can guide SMEs in applying the learning material to their specific needs.
- Develop simplified versions of the material for SMEs with limited capacity or resources.
- Create a peer-to-peer learning network where businesses can share experiences and best practices related to data use.

[Time Bound]

Medium-term

[Effort]

High Effort

## g. Best Practices & Case Studies

### i. Best Practices

#### Informal Resilience Tourism Committee / Ad hoc group

[Destination]

Not applicable

In response to the COVID-19 pandemic emerging in China and in the East Asian market, **DG-GROW established an ad hoc group to monitor the unfold of the crisis in the East Asian Market.**

#### The ad hoc group included the following participants:

- ACI-Europe – Airports Council International – Europe
- A4E – Airlines for Europe
- EU Travel Tech – European Travel Tech Organisation
- ETC – European Travel Commission
- HOTREC – Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments in the European Union and European Economic Area
- ECTAA – European Travel Agents' and Tour Operators' Association
- ETOA – European Tourism Association
- EEIA – European Exhibition Industry Alliance
- CLIA – Cruise Lines International Association
- ERAA – European Regions Airline Association
- UNWTO – World Tourism Organisation
- WTTC – World Travel & Tourism Council

[Description of the initiative/action/policy/governance structure and process]

The **primary objective** of this group was to engage in **nowcasting, which involved assessing the speed and severity of the downturn.** Through discussions within the ad hoc group, it became apparent that the tourism ecosystem was experiencing a much faster decline compared to other sectors.

With the **unfold of the pandemic in Europe**, the agenda primarily focused on **crisis management strategies to effectively deal with the emergency, mitigate its impact and avoid a domino effect.** In this stage the group **provided recommendations on emergency measures necessary for the ecosystem's survival.** To support recommendations, they were analysing: 1) drop in demand, 2) liquidity and insolvency of companies (to estimate the severity and length of the crisis on the different tourism ecosystem sectors and understand possible domino effects).

On a second stage the focus changed to **the restart of tourism.** Their discussions included identifying the **bottlenecks** for recovery (e.g., if airports are closed, the restart is not possible) and **enablers** for a faster recovery (e.g., the Digital COVID Certificate).

[Type]

Governance Structures & Processes

[Date of launch]

February 2020

[Impact]

1. Improved coordination with and amongst tourism ecosystem stakeholders and a coordinate response to the crisis
2. Enabled timely response and decision-making

### Informal Resilience Tourism Committee / Ad hoc group

	<ol style="list-style-type: none"> <li>3. Served as an early warning mechanism and helped anticipate potential domino effects</li> <li>4. Provided recommendations to policy makers that contributed to the mitigation of the impacts of the crisis and to a faster recovery</li> </ol>
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[Relevance] Monitoring and coordination structures play a crucial role in monitoring, assessing, and responding to the challenges faced by the tourism ecosystem during a crisis. The establishment of ad hoc groups is an answer to improve coordination and decision-making. By providing real-time information, recommendations, and early warnings, such initiatives help policymakers and industry stakeholders navigate the crisis and work together towards the industry's survival and recovery.

[Issuing organisation]	DG GROW
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### High-Level Working Group on Tourism

[Destination]	Finland
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The High-Level Working Group on Tourism is an **expert advisory body on tourism development strategy** created to face the challenges posed by the COVID-19 pandemic and promote the implementation of Finland's tourism strategy for 2019-2028.

[Description of the initiative/action/policy/governance structure and process] The working group is led by the Minister of Economic Affairs, who oversees tourism policy development and support. It includes relevant ministries, administrative units, regional councils, state administration, regional tourism organisations, travel companies, research and educational institutions, and organisations.

- During the pandemic this group focused on:**
- **Crisis response and recovery:** assessing the impact of the crisis, identifying measures to mitigate its effects, and recommending policies and actions to facilitate recovery.
  - **Coordination and collaboration:** promoting coordinated response and cooperation for tourism development.
  - **Monitoring and evaluation:** monitoring the evolution of the crisis and of the effects of the policies implemented, by analysing tourism-related research, including market trends, travellers' behaviour, and the sector's economic impact. Also, monitoring the implementation of Finland's tourism strategy.

[Type]	Governance Structures and Processes
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[Date of launch]	September 2021 (and last until December 2028)
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[Impact]	<ol style="list-style-type: none"> <li>1. Contributed to the development of policies and strategies to support the growth, competitiveness, and resilience of the tourism ecosystem</li> <li>2. Fostered collaboration and coordination between different government departments, tourism organisations, and industry stakeholders</li> <li>3. Played a vital role in managing the impact of the crisis on the tourism ecosystem</li> </ol>
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## High-Level Working Group on Tourism

[Relevance] A robust coordination system that includes horizontal, vertical, and sectoral coordination is critical not only during a crisis but also to support the development of sustainable and resilient tourism strategies.

[Issuing organisation] Ministry of Economic Affairs and Employment of Finland

## Local Coordination between ski destinations

[Destination] Tyrol, Austria

The ski resorts in Austria, particularly in the Tyrol region, attract a considerable number of international tourists during the winter season.

With the emergence of the pandemic, there were concerns about the potential spread of the virus through ski tourism activities. In response, **local governments of various ski resort towns and regions collaborated to implement coordinated measures to ensure the safety of visitors and residents while preserving the tourism industry.**

[Description of the initiative/action/policy/governance structure and process]

**To achieve this objective local governments in the region of Tyrol have:**

- Established communication channels and forums for discussion, information sharing and strategy alignment.
- Developed common guidelines and protocols for ski resorts (such as measures related to health and safety, capacity limitations, social distancing, and hygiene standards).
- Cooperated with regional health authorities and tourism boards to enhance testing capabilities, provide clear communication to tourists regarding safety measures, and establish efficient contact tracing systems.
- Worked closely with local businesses, accommodation providers, and tourism stakeholders to ensure their compliance with the prescribed guidelines.

[Type] Governance Structures and Processes

[Date of launch] March 2020

[Impact]

1. It enabled a balanced approach between protecting public health and supporting the tourism industry
2. It ensured consistency in the implementation of measures across different ski resorts and helped in building trust among tourists.
3. Allowed for a safer and more controlled operation of ski resorts
4. Tyrol was the 6th European region with the highest number of nights spent in tourist accommodations in 2020

[Relevance] The coordination between local governments in the Tyrol region highlights the importance of cooperation and collaboration at the local level. By working together, sharing information, and aligning strategies, local governments can effectively address the challenges posed by a crisis, protect public health, and ensure the sustainable recovery of the tourism industry.

[Issuing organisation] Tyrol Region and Local Administrations



Tourism Advisory Board	
[Destination]	Estonia
[Description of the initiative/action/policy/governance structure and process]	<p>Following the successful regular roundtable during the COVID-19 pandemic, a Tourism Advisory Board was established. The board is composed of the Ministry of Economic Affairs and Communications, Ministry of Culture, Tourism Board, professional tourism associations, destinations, and major gateways. Additionally, the roundtable format has been continued as an informal meeting style. <b>Cooperation between the public and private sectors has advanced as a result</b>, with more frequent and open communication.</p> <p><b>Frequency of the meetings:</b> The board meets <b>twice each year</b>.</p>
[Type]	Governance Structures & Processes
[Date of launch]	October 2020
[Impact]	<ol style="list-style-type: none"> <li>1. Fostered collaboration and communication among various stakeholders in the tourism industry</li> <li>2. Allowed for the formation of public-private partnerships (PPPs), leveraging the strengths of both sectors, combining resources, expertise, and networks to address complex challenges</li> <li>3. Fostered an environment for continuous improvement and adaptation to evolving market trends</li> </ol>
[Relevance]	<p>The private sector is a key stakeholder in tourism policy making, comprising businesses such as hotels, airlines, tour operators, travel agencies, restaurants, and attractions. Their investments, innovations, and operations drive the sector's economic growth and job creation. During crises, the tourism ecosystem engagement with the private sector is crucial for effective crisis management and recovery efforts. Their agility and resources can contribute to the industry's resilience.</p>
[Issuing organisation]	Ministry of Economic Affairs and Communications and Ministry of Culture

Re-open EU	
[Destination]	Not applicable
[Description of the initiative/action/policy/governance structure and process]	<p>The "Re-open EU" platform was an initiative aimed at <b>providing up-to-date information on travel and tourism restrictions within the EU during the COVID-19 pandemic</b>.</p> <p>The platform, which was also available in a mobile friendly version (a web-based app), was created to <b>help travellers navigate the evolving situation and make informed decisions about their journeys</b>. Its primary goal was to provide <b>transparent and reliable information on travel restrictions, health and safety measures, and other relevant information across Member States</b>. It was updated daily with information provided by the Member States authorities to the platform about restrictions and measures in their countries.</p>

## Re-open EU

### Key information available on the platform:

- Travel restrictions
- Health and safety measures
- Tourism services availability
- Transport information
- Real-time updates

[Type]	Initiative – Data & Digital / Health & Security
[Date of launch]	June 2020 (until June 2023)
[Impact]	<ol style="list-style-type: none"> <li>1. It was one of the most visited EC's pages ever and most-ever downloaded EC mobile app</li> <li>2. It became the key point of reference for anyone travelling in the EU as it centralised up-to-date information from the Commission and the Member States</li> <li>3. It increased transparency and reliability of the information on travel restrictions, quarantine measures and health &amp; safety measures</li> <li>4. It was an enabler for tourism recovery</li> </ol>
[Relevance]	<p>Clear communication channels and access to accurate information are critical needs for the tourism ecosystem to effectively respond and recover from future crisis events. In times of crisis, transparent communication ensures that relevant information reaches all stakeholders, including government authorities, tourism businesses, and tourists. This is also a good example of how a centralised source of information, ensures stakeholders have easy access to information.</p>
[Issuing organisation]	European Commission DG GROW and Joint Research Centre

## Clean & Safe Seal

[Destination]	Portugal
[Description of the initiative/action/policy/governance structure and process]	<p>The <b>Clean &amp; Safe seal in Portugal was a certification program</b> launched by Turismo de Portugal, the country's national tourism authority.</p> <p>It aimed to ensure that <b>tourism establishments and businesses in Portugal had implemented and adhered to the recommended hygiene and safety measures, particularly in response to the COVID-19 pandemic</b>. The program was designed to <b>promote Portugal as a safe and trustworthy destination for tourists</b>.</p> <p><b>Key features of this certification program:</b></p> <ul style="list-style-type: none"> <li>• Tourism businesses could voluntarily participate</li> <li>• The program provided specific health and safety protocols to follow</li> <li>• Participating businesses received free training</li> <li>• Turismo de Portugal verified compliance with the protocols</li> <li>• Businesses that met the requirements received the Clean and Safe seal</li> <li>• Ongoing monitoring and audits ensured that participating businesses stayed up to date with the latest recommendations</li> </ul>

Clean & Safe Seal	
[Type]	Initiative – Health & Safety
[Date of launch]	April 2020
[Impact]	<ol style="list-style-type: none"> <li>1. Turismo de Portugal issued more than 22.000 seals, give training to more than 43.000 tourism workers and performed close to 2.000 audits</li> <li>2. It contributed to rebuilt trust and confidence among tourists</li> <li>3. It standardised a set of hygiene and safety measures for tourism businesses across Portugal</li> <li>4. Improved safety and hygiene practices within the tourism ecosystem</li> <li>5. Enhanced reputation of Portugal as a safe destination</li> </ol>
[Relevance]	Health and Safety Seals/Certifications are important tools to 1) mitigate the effect of crisis events as they provide a framework and training for tourism establishments to implement and adhere to health and safety protocols and 2) increase customer confidence, accelerating the recovery of tourism.
[Issuing organisation]	Turismo de Portugal

Guarantee schemes for vouchers	
[Destination]	Denmark
[Description of the initiative/action/ policy/governance structure and process]	<p>The COVID-19 pandemic led to mass cancellations of travel bookings. Besides the loss of revenues, organisers were particularly hit by refund requests significantly exceeding the level of new bookings.</p> <p>Considering the <b>critical cash-flow situation of tourism businesses</b>, some Member States, such as Denmark, adopted specific State aid measures to support package travel organisers and <b>set up guarantee schemes for vouchers</b> to ensure that, in the event of insolvency of the organiser, travellers are reimbursed, as recommended by the Commission in its Recommendation 2020/648.</p> <p>Under the State aid Temporary Framework to support the economy in the context of the COVID-19 outbreak, Denmark adopted a <b>€200 million loan in support of the Travel Guarantee Fund for travel cancellations due to the coronavirus outbreak</b>.</p> <p><b>The objectives of this measure were:</b></p> <ul style="list-style-type: none"> <li>• To ensure that sufficient liquidity remained available for travel organisers to counter the damage inflicted in the package travel market</li> <li>• To preserve the continuity of economic activity during and after the coronavirus outbreak</li> <li>• To ensure the quickest possible settlement of related refunds or reimbursements to travellers</li> </ul>
[Type]	Measure – Financial
[Date of launch]	March 2020
[Impact]	<ol style="list-style-type: none"> <li>1. Improved the liquidity of tourism businesses</li> </ol>

**Guarantee schemes for vouchers**

	<ol style="list-style-type: none"> <li>2. Allowed travel organisers to settle tourists' claims quickly and efficiently</li> <li>3. Safeguarded consumers' money in the event of a tour operator's bankruptcy or insolvency</li> <li>4. Increased customer confidence</li> </ol>
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[Relevance]	<p>The financial measures implemented to support businesses, particularly SMEs, played a vital role in mitigating the effects of the COVID-19 pandemic. Guarantee schemes (especially for vouchers) were instrumental in preventing business defaults and insolvency by providing businesses with the liquidity they need and by increasing consumer confidence in accepting vouchers instead of money reimbursement.</p>
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[Issuing organisation]	European Commission / Danish Government
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**Campaign "Tourism Makes Ljubljana ..."**

[Destination]	Ljubljana, Slovenia
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[Description of the initiative/action/policy/governance structure and process]	<p>Tourism Ljubljana promoted a campaign to increase residents' awareness about the advantages of tourism for the community. This encompassed initiatives such as bike parks, festivals, sports facilities, and electric buses for enhanced mobility, all funded through tourism taxes.</p> <p>The Tourism Board of Ljubljana harnessed digital tools and promotional displays throughout the city to visually demonstrate to residents how these amenities and infrastructure projects were made possible through tourism-generated revenue.</p> <p>The campaign, characterised by its informative nature, garnered significant attention not only from local and international media but also from local non-governmental organisations and residents. Ljubljana serves as a shining example of how to highlight the often-overlooked benefits that tourism can bring to local communities.</p>
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[Type]	Measure – Promotional
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[Date of launch]	2021
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[Impact]	<ol style="list-style-type: none"> <li>1. Raised awareness on tourism, improving the city for its residents</li> <li>2. Displayed, with posters, how the city benefited from the direct boost of profits in tourism</li> <li>3. Co-financed several projects with revenues from tourism, such as: Gault &amp; Millau Ljubljana Quality Mark 2021, November Gourmet Ljubljana, Green Scheme of Slovenian Tourism, Ljubljana-Style Breakfast, Green Supply Chains, European Food Summit, open air events, Ljubljana Ambassador Club, Ljubljana Convention Bureau Consortium, amongst others.</li> </ol>
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### Campaign “Tourism Makes Ljubljana ...”

[Relevance]

Campaigns like this one are crucial in highlighting the symbiotic relationship between tourism and the local community. By promoting tourism and reinvesting the profits into city improvements, these campaigns create a positive feedback loop. They not only enhance the tourist experience, but also enrich the quality of life for residents. In crisis scenarios residents play a crucial role in the development and transformation of more sustainable models of tourism while also compensating the decrease of international tourism. Tourism policies should be strongly incorporated in local communities, increasing the quality of life of the local population, and making destinations more resilient.

[Issuing organisation]

City of Ljubljana & Ljubljana Tourism

### EU Tourism Dashboard

[Destination]

Not applicable

[Description of the initiative/action/policy/governance structure and process]

The EU Tourism Dashboard is an online knowledge / data tool launched by the Commission in October 2022.

As an expert tool, it was disseminated across policy makers and is used by stakeholders to guide policies and strategies within the ecosystem.

It aimed at promoting and monitoring the:

- Green and digital transitions
- Socio-economic resilience factors of the European tourism ecosystem

The EU Tourism Dashboard categorises indicators into three policy pillars: **‘environmental impacts,’ ‘digitalisation,’** and **‘socio-economic vulnerability.’**

The dashboard presents visual representations of data and indicators relevant to tourism, collected from reliable sources related to the tourism industry.

It provides a range of consistent and evidence-based indicators at national and regional level, enabling tourism decision makers and managers to recognise vulnerabilities such as high seasonality or high dependence on visitors from few origins.

Furthermore, it includes a collection of **‘basic tourism descriptors’** that provide additional information about the characteristics of tourism destinations, including demand, supply, and overall tourism offerings. The dashboard currently encompasses all EU27 Member States, as well as Iceland, Norway, and Switzerland.

[Type]

Data collection, analysis, and reporting

[Date of launch]

October 2022

EU Tourism Dashboard	
[Impact]	<ol style="list-style-type: none"> <li>1. Visited more than 5.000 times since its launch (3min25sec/visit, high engagement: 1o clicks)</li> <li>2. Improved the data available for tourism stakeholders, especially in the field of resilience</li> </ol>
[Relevance]	<p>The EU Tourism Dashboard is a valuable platform for destinations and tourism businesses to access. Its indicators go beyond simple data records or statistics and help characterise the tourism ecosystem at the country level by monitoring progress in reducing environmental impacts, promoting digitalisation, and strengthening resilience</p>
[Issuing organisation]	European Commission <sup>35</sup>

Cascais COVID War Room	
[Destination]	Cascais, Portugal
[Description of the initiative/action/policy/governance structure and process]	<p>COVID War Room was designed to support cities and governments grappling with the challenges posed by the pandemic. It was rapidly implemented to provide decision-makers with control over the municipality's situation and access to real-time information essential for making urgent responses.</p> <p>It aimed at:</p> <ul style="list-style-type: none"> <li>• Integrating the pandemic response by centralising requests and occurrences by citizens on services</li> <li>• Monitoring COVID-19 suspicious cases using real-time monitoring and reporting of case developments</li> <li>• Managing COVID-19 testing scheduling and results by consolidating tests scheduling and results in a single place</li> <li>• Monitoring resources availability by supervising assets and equipment capacity and resources allocation</li> </ul>
[Type]	Data collection, analysis, and reporting
[Date of launch]	2020
[Impact]	<ol style="list-style-type: none"> <li>1. Provided a holistic overview and management of the entire COVID-19 process in a single platform</li> <li>2. Enhanced confidence in the population while promoting citizen engagement by involving them in the battle against the pandemic</li> <li>3. Facilitated the return of economic activities</li> <li>4. Provided a national and international perception of security and confidence – key to restoring Cascais tourism-based economic activity</li> </ol>

<sup>35</sup> The EU Tourism Dashboard was developed and is being maintained by the European Commission Joint Research Centre in collaboration with DG GROW

**Cascais COVID War Room**

[Relevance] Centralising real-time data and information within a single command centre is of paramount importance for any municipality. It allows for swift, well-informed decision-making and the coordination of immediate responses to a wide range of situations, from emergencies and public safety concerns to city operations and service delivery. This centralised approach ensures that key stakeholders have access to accurate, up-to-the-minute data, promoting efficient resource allocation, effective communication, and a more streamlined management of municipal affairs. Whether addressing crisis situations or daily urban challenges, a single command centre acts as the nerve centre, enhancing the municipality's ability to serve its residents and tourists effectively.

[Issuing organisation] Câmara Municipal de Cascais

## ii. Case Studies

Montenegro National Tourism Organisation	
[Destination]	<p>Montenegro</p> <p>The richness of Montenegro's natural resources, its affordability, and strong international relations function as key assets, providing a solid foundation for growth.</p>
[Context & Challenge]	<p>However, the development of its tourism ecosystem faces several challenges, including <b>lack of regional agencies to coordinate efforts at regional / local levels, limited workforce with lack of crisis management knowledge and expertise, and lack of data to facilitate decision making.</b></p> <p>Montenegro's National Tourism Organisation is actively working to strengthen collaboration between government and tourism stakeholders, with an emphasis on enhancing crisis preparedness and management to better respond to environmental and other crisis events.</p>
[Actions]	<p>Considering the current context and challenges identified, Montenegro NTO developed the following actions:</p> <p><b>1. Coordination &amp; Collaboration:</b></p> <ul style="list-style-type: none"> <li>• Establish <b>cross-sectoral working groups</b> at the national level to improve collaboration among tourism stakeholders.</li> <li>• Conduct <b>regular meetings at the local level</b> to discuss specific topics and needs regarding crisis and risk management.</li> <li>• Conduct <b>interministerial meetings</b> at the national level to discuss and align on specific topics and approaches to take in the case of a crisis event.</li> <li>• Establish an <b>online platform for information-sharing and knowledge exchange</b> among tourism stakeholders, leading to more coordinated and informed decision-making.</li> </ul> <p><i>Replicability potential: High (it does not require significant resources)</i></p> <p><b>2. Training and Capacity Building:</b></p> <ul style="list-style-type: none"> <li>• Implement <b>awareness raising/educational campaigns</b> for tourism stakeholders, visitors and local population on risk and crisis management. This will be complemented with the development and implementation of a <b>training program</b> for tourism stakeholders.</li> <li>• Strengthen tourism-related institutions on risk and crisis management by <b>collecting and disseminating good practices</b> on the topic, developing and implementing a <b>training program for public institutions.</b></li> <li>• Train their staff to be better equipped to identify and apply to existing <b>EU/international funding opportunities</b>, which can be used to implement crisis preparedness initiatives.</li> </ul> <p><i>Replicability potential: Moderate (requires technical, financial, and human resources to develop campaigns and to develop and deliver training programs)</i></p> <p><b>3. Data Collection &amp; Analysis:</b></p> <ul style="list-style-type: none"> <li>• Define a <b>set of indicators</b> to monitor the tourism activity.</li> <li>• Implement effective <b>data collection and analysis methods and tools</b> to support risk sensing and informed decision-making, allowing for better strategic planning and policy development.</li> </ul> <p><i>Replicability potential: Moderate / Low (it depends on the indicators defined and on the availability of information. Paid data sources and advanced data collection and analysis tools require significant technical and financial resources)</i></p>



## Montenegro National Tourism Organisation

With the implementation of the actions mentioned above, Montenegro NTO is expected to address the challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those with similar level (national) and mandates (legislative, operational, marketing & promotion) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

### Strengthen Governance and Coordination:

- **Enhancing** vertical, horizontal, and sectoral **coordination**, among tourism ecosystem stakeholders and with other sectors with influence or interest over tourism, increases the effectiveness of crisis preparedness and management strategies. Better-coordinated responses to crises, and a safer environment for tourists and residents, leads to faster and more effective action during emergencies.
- **Regular communication** and **information exchange** among stakeholders improves the coordination and response during crises by ensuring timely, accurate information flow, which is essential for effective decision-making and resource allocation.

[Expected Impact & Lessons Learned]

### Improve Resilience and Crisis Preparedness:

- Implementing **ongoing training programs** and promoting **continuous development** ensures that organisations and staff are well-prepared to manage risks and crises.
- **Accessing and leveraging** external **funding and resources** enhances an organisation's capacity to implement crisis management strategies. Increased financial resources are crucial for crisis preparedness, response, and recovery, as well as capacity building within the tourism ecosystem.
- Implementing **awareness raising campaigns** and educating stakeholders about the risks and necessary preventative measures is crucial for crisis management as it empowers individuals and organisation to take proactive steps, reducing vulnerabilities and enhancing preparedness.

### Facilitate Data Deployment:

- Continuously **collecting and analysing data** is important to prepared and respond to crisis events as it supports informed decision-making and strategic planning, enabling more effective and timely interventions.

## National Tourism Organisation of a Southern European Country

[Destination]

National Tourism Organisation of a Southern European Country

Crisis management and communication plans should be extended, enhanced and coordinated between public and private sector and managed according to different levels needs.

[Context & Challenge]

The tourism ecosystem, characterised by SMEs with lacking financial resilience, requires attention. For these companies, the challenge is to strength strategic resilience as well as operational crisis management and increase preparedness knowledge and expertise.

Additionally, problems arising from climate change need to be managed carefully to maintain tourism ecosystem's resilience and success.

[Actions]

Considering the current context and challenges identified, the organisation developed the following actions:

### **1. Crisis Communication:**

- Reinforce the communication plan by mapping out interlocutors by themes and defining communication procedures (What? How? When? Who?) on the three stages of a crisis (prepare, respond and recover).

*Replicability potential: High (it does not require significant resources)*

### **2. Data Collection & Analysis:**

- Establish a multidisciplinary crisis management team to create a data governance model. This team will define key indicators, identify correlations, dashboards and reporting that needs to be created.

*Replicability potential: Moderate (requires high expertise in data collection and analysis mechanisms, the use and correlations of indicators, data visualisation tools and predictive models)*

### **3. Secure Funding:**

- Adjust financing opportunities according to the risks (e.g., lack of water, extreme climate events, floods) and challenges (e.g.: lack of training, infrastructure improvement) identified.

*Replicability potential: Low (only possible to organisations whose responsibilities include the managing tourism financing opportunities. Nevertheless, others can advocate for the development of financing opportunities to the identified risks and challenges)*

### **4. Coordination and Collaboration:**

- Establish a multidisciplinary crisis management team with a representative group of tourism ecosystem stakeholders.
- Create a single communication / coordination channel dedicated to crisis management (with the possibility of creating a platform, if necessary).
- Define procedures for status updates on crisis situations between public departments.

*Replicability potential: High (it does not require significant resources)*

### **5. Governance Structure Strengthening:**

- Strengthen cooperation networks at the institutional level (national, international/European) and maintain these networks active through good practices sharing and regular meetings (virtual and/or in person).

*Replicability potential: High (It is a work that is being developed between stakeholders)*

### **6. Product Development:**

- Keep the process of diversify the products/touristic offers to cater to new segments (e.g.: Cultural tourism and less intense tourism promoting national cultural heritage spots).

*Replicability potential: High (it does not require significant resources)*

### **7. Strategic Planning:**

- Review and adjust strategies for strengthening resilience. Publish and disseminate guidelines to each tourism ecosystem sector (e.g.: hotels, food service, entertainment, tour operators and travel agents, etc.).

*Replicability potential: High (it does not require significant resources)*

**National Tourism Organisation of a Southern European Country**

**8. Training and Capacity Building:**

- To continue using the existing Digital knowledge platforms to capacitate tourism companies and professionals.
- Develop additional training in areas such as communication, financing, human resources, and business process adjustment.
- To contribute for the creation of a European Digital Academy on Tourism.

*Replicability potential: Moderate (requires significant human, technical and financial resources to develop training and capacity building programs)*

With the implementation of the actions mentioned above, it is expected to address the challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those with similar level (national) and mandates (operational, marketing & promotion) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

**Strengthen Governance and Coordination:**

- Developing a cohesive crisis management team enhances coordination and preparedness for future crisis events and effectiveness when a crisis hits.
- Strengthening communication protocols ensures clarity, timeliness, and consistency in messaging throughout all stages of crises, fostering trust with stakeholders.

**Improve Resilience and Crisis Preparedness:**

- Developing tailored communication plans to prepare, respond and recover from a crisis ensures that all stakeholders are well-informed and can take appropriate actions at each stage of the crisis.
- Diversifying tourism product offering and source markets, promoting lesser-known products and areas to ease pressure on major attractions, and encouraging tourism during off-peak seasons, enhances the resilience of tourism destinations. Moreover, when a crisis hits, impacting certain assets or resources, it allows the destination to re-focus efforts to other existing tourism offerings.
- Establishing educational platforms and skills development programs strengthens competencies and fosters adaptive capacity and professional resilience in crisis response and recovery efforts.
- Adjusting financing mechanisms aligns resources with emerging risks, supporting timely interventions and resilience-building efforts.

**Facilitate Data Deployment:**

- Establishing a robust data governance model enhances decision-making through real-time insights and predictive analytics. It emphasises the value of data-driven strategies in crisis preparedness and management, fostering agility and informed responses.

[Expected Impact & Lessons Learned]

**National Tourism Organisation of a Northern European Country**

[Destination]

National Tourism Organisation of a Northern European Country

[Context & Challenge]

The northern country is a highly attractive destination, known for its beautiful, diverse seasons and well-established tourism infrastructure. Its reputation as a less crowded and eco-friendly destination aligns well with the growing demand for sustainable travel. Moreover, it enjoys a strong, positive image globally, thanks to its stable and transparent society, which fosters trust in its authorities.

**National Tourism Organisation of a Northern European Country**

The organisation, with its agile and low-hierarchy structure, is well-prepared to make quick decisions and adapt to changing circumstances, further enhancing the nation's appeal as a safe and reliable travel destination.

The country's tourism ecosystem also faces challenges, primarily due to the lack of a unified approach to risk management. Without a central authority overseeing crisis management, responses can be fragmented and slow.

Current geopolitical tensions have introduced significant accessibility constraints to the destination. The country has lost its competitive advantage as a hub for the East due to flight restrictions over Russian airspace, and it is now inaccessible by train for international travelers. Additionally, lack of mobility and accessibility options within some cities and between different regions is also a challenge.

<p>[Actions]</p>	<p>Considering the current context and challenges identified, the organisation developed the following actions:</p> <p><b>1. Governance Structure Strengthening:</b></p> <ul style="list-style-type: none"> <li>• Define roles and responsibilities for crisis management within the organisation and assigning people to pre-defined roles. Communicate these assignments both internally and externally.</li> <li>• Establish a steering group to coordinate the crisis management efforts of the tourism ecosystem.</li> </ul> <p><i>Replicability potential: Moderate (it requires human resources and technical capacity within the organisation to implement the crisis management structure)</i></p> <p><b>2. Crisis Management Plan:</b></p> <ul style="list-style-type: none"> <li>• Develop a crisis management plan for the destination. Identify tourism ecosystem stakeholders, their roles in a crisis and how they should be involved, and document possible crisis scenarios and related actions plans to each scenario.</li> </ul> <p><i>Replicability potential: High (it does not require significant resources)</i></p> <p><b>3. Crisis Communication:</b></p> <ul style="list-style-type: none"> <li>• Implement a crisis communication system. Identify target groups and select the appropriate communication channels for each stakeholder.</li> </ul> <p><i>Replicability potential: High (it does not require significant resources)</i></p> <p><b>4. Infrastructure Development:</b></p> <ul style="list-style-type: none"> <li>• Create a roadmap to improve accessibility and mobility by collaborating with transportation &amp; mobility solutions' providers and infrastructure public departments. Also, survey travelers to understand their preferences and needs.</li> </ul> <p><i>Replicability potential: Moderate (requires significant coordination efforts with transportation and mobility providers and expertise in accessibility and mobility)</i></p>
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[Expected Impact & Lessons Learned]

With the implementation of the actions mentioned above, The organisation is expected to the address the challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those with similar level (national) and mandates (operational) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

**National Tourism Organisation of a Northern European Country**

**Strengthen Governance and Coordination:**

- Defining roles and responsibilities for crisis management and establishing a dedicated steering group leads to increased coordination amongst tourism ecosystem stakeholders and a more effective response to crises.

**Improve Resilience and Crisis Preparedness:**

- Developing a crisis management plan with clear protocols and well-defined responsibilities is a crucial first step to enhance the preparedness and the effectiveness of response effort for future crisis events.
- Implementing a crisis communication system ensures that all stakeholders are timely and accurately informed through appropriate channels, enhancing trust and cooperation.
- Improving accessibility and mobility, makes the destination more inclusive and prepared to withstand future crisis events. Moreover, considering slow, low-carbon travel solutions aligns with global sustainability trends.

**Timis County Council**

[Destination]

Timis County

Timis County Council is situated in the Banat region, known for its rich cultural heritage and multicultural identity. As the European Capital of Culture for 2023, Timisoara enjoys a spotlight on its cultural life and festivals, which attract visitors interested in its diverse offerings. Moreover, the region's reputation as a safe destination, coupled with its vibrant cultural scene and multicultural environment, provides a solid foundation for sustainable tourism growth.

Despite these strengths, Timis County Council faces challenges including political tensions affecting neighbouring regions like Moldova and the Balkans, which pose risks to its stability and appeal as a tourist destination.

[Context & Challenge]

A significant issue is the shortage of qualified professionals in tourism, leading to inadequate service quality and potential negative impacts on visitor experience. Infrastructure deficiencies, such as underdeveloped highways, airports, and hotels, also hinder Timis County Council's ability to accommodate and attract tourists effectively. Additionally, Timis County Council struggles with maintaining its cultural identity amidst globalisation pressures and unclear administrative responsibilities, which can complicate decision-making and resource allocation.

Additionally, the region is highly concerned with natural and environmental risks such as extreme weather, floods and earthquakes.

[Actions]

Considering the current context and challenges identified, Timis County Council developed the following actions:

**1. Training and Capacity Building:**

- Train tour guides and local tour operators to develop new products that go beyond their traditional offering, with focus on cultural identity, rural life, and natural attractions.
- Develop awareness building campaigns about career opportunities in the tourism ecosystem for schools, universities, and the public in general, involving the private sector with "Open Day" initiatives, internships, etc.
- Establish a specialised institution, such as an "Academy for Hospitality," to provide training for tourism professionals, focusing on customer care and interaction with diverse cultural backgrounds, thereby enhancing the customer journey and overall satisfaction.

**National Tourism Organisation of a Northern European Country**

*Replicability potential: Moderate (it requires significant human, technical and financial resources to develop and deliver training and particularly to create an academy for hospitality)*

**2. Marketing & Promotion:**

- Develop promotional campaigns aligned with new flight connections that promote travel to and from Romania, Timis County and Timisoara (focusing on potential priority source markets like France, other not-yet-served airports in Germany, any other aviation hubs in Western and Eastern Europe like Budapest or Istanbul).
- Translate existing promotional materials to other languages, to address other source markets.

*Replicability potential: High (it does not require significant resources)*

**3. Product Development:**

- Define priorities for new product development based on feedback received from tour operators, tour guides, info centres, arrival statistics and publicly available market intelligence from the Ministry of Tourism and other sources.
- Develop cross-border tourism products with Hungary and Serbia, fostering opportunities for articulating product development (workshops, info trips) as well as commercial interactions (joint marketing) between services (mainly tour operators) in the three countries, facilitating operational and legal aspects.
- Implement actions to mitigate climate extreme events (install vaporizers during summer, offer more tourism options in green spaces outside the city, organise tours in early morning or late afternoon).

*Replicability potential: Moderate (it requires enhanced public-private coordination and cross-border cooperation to develop tourism offering)*

**4. Coordination & Collaboration:**

- Establish a coordination committee for emergencies (like floods, earthquakes, effects from war in neighbouring countries) so that all tourism stakeholders can speak and act with a unified voice.
- Gather experts from professional associations, universities, research institutions, law offices, industry sub-sectors) for the elaboration of proposals (technical input for effective lobbying).

*Replicability potential: High (it does not require significant resources)*

With the implementation of the actions mentioned above, Timis County Council is expected to address challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those with similar level (regional) and mandate (operational, marketing & promotion) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

[Expected Impact & Lessons Learned]

**Governance Structure Strengthening:**

- Establishing a coordination committee for emergencies ensures efficient and unified crisis action and communication, enhancing safety and preparedness.

**Improve Resilience and Crisis Preparedness:**

- Establishing an Academy for Hospitality and providing comprehensive training for guides and operators, focusing on customer care and cultural sensitivity, capacitate the tourism ecosystem to improve tourist experience.
- Awareness campaigns and engagement with educational institutions,

**National Tourism Organisation of a Northern European Country**

attract new talent to the tourism ecosystem, ensuring a steady influx of skilled professionals.

- Collaborating with tourism businesses and using market intelligence to develop new and cross-border tourism products, contributes to the creation of unique experiences, to the diversification of tourism offering and to enhance regional cooperation.
- Developing comprehensive tourism plans ensures a strategic and resilient approach to tourism management.
- Aligning promotional campaigns, enhancing air connectivity and translating materials contributes to expand market reach and diversify source market base.

**DMO Provincia Latina**

[Destination]

DMO Provincia Latina

DMO Provincia Latina is strategically positioned between Rome and Naples, offering a blend of urban charm and natural beauty that attracts tourists seeking diverse experiences. This intermediate location serves as a gateway to Italy's cultural treasures and scenic landscapes, enhancing its appeal as a tourist destination. The region also has a rich culinary tradition and a wealth of artistic and natural heritage.

[Context & Challenge]

Despite its advantages, DMO Provincia Latina faces several challenges. The lack of public funds and a coherent local tourism and marketing strategy limit effective tourism development and infrastructure improvement.

Tourism stakeholders lack materials, guidelines, training and expertise in the topics of resilience and crisis management.

Difficulties in preserving and managing cultural heritage negatively impact tourists' experiences. Additionally, issues such as urban and natural degradation pose ongoing challenges that require careful management and resource allocation.

[Actions]

Considering the current context and challenges identified, DMO Provincia Latina developed the following actions:

**1. Training and Capacity Building:**

- Develop training materials and program in crisis management, and implement it throughout the entire tourism ecosystem of the destination tourism ecosystem.
- Create a centralised online hub or resource repository for the ecosystem to access and share training materials, guidelines, and best practices related to resilience and crisis management.
- Promote operators' training through events such as conferences, workshops, and seminars.

*Replicability potential: Moderate (it requires significant human, technical and financial resources to develop and deliver training and to establish and keep updated a centralised online hub and discussion forum)*

**2. Product Development:**

- Review and expand the product portfolio of the destination to respond to market changes, meet emerging demands and respond to diverse types of risks (urban and natural degradation) and crises events.
- Introduce new and unique touristic products, experiences, and services to attract and engage tourists.

DMO Provincia Latina	
	<p><i>Replicability potential: Moderate (it requires significant human, technical and financial resources, and enhanced coordination with the private sector to develop and implement new tourism offering)</i></p> <p><b>3. Marketing &amp; Promotion:</b></p> <ul style="list-style-type: none"> <li>• Create a marketing plan to improve destination visibility, diversify tourist segments, and promote unique experiences, thereby boosting overall tourism growth and resilience.</li> </ul> <p><i>Replicability potential: High (it does not require significant resources)</i></p> <p><b>4. Governance Structure Strengthening:</b></p> <ul style="list-style-type: none"> <li>• Establish a discussion forum with the local governance to exchange information and discuss policy implementation and development.</li> <li>• Create a digital platform to facilitate communication by WhatsApp groups and broadcast as well as a Facebook dedicated group.</li> </ul> <p><i>Replicability potential: High (it does not require significant resources)</i></p>

With the implementation of the actions mentioned above, DMO Provincia Latina is expected to address the challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those with similar level (regional) and mandate (marketing & promotion) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

**Strengthen Governance and Coordination:**

- Establishing a discussion forum with tourism ecosystem stakeholders from different levels improves coordination, resilience and crisis preparedness and management by taking in consideration different views and the needs of local stakeholders.

[Expected Impact & Lessons Learned]

**Improve Resilience and Crisis Preparedness:**

- Conducting comprehensive training needs assessments, developing detailed curriculums, and regularly updating programs through a centralized online hub ensures stakeholders are well-prepared for crisis management, enhancing overall resilience and promoting a culture of continuous learning and adaptability.
- Developing new and innovative products and services ensures the destination remains competitive, can adapt to changing conditions and crises, attract diverse visitor segments, and enhance the overall visitor experience.
- The implementation of marketing plan strategies ensures the destination targets the best tourist segments (and reduces dependency of top source markets) and channels and improves destination image and awareness, factors that are critical to build resilient destinations.

Rheinland-Pfalz Tourismus GmbH	
[Destination]	Rheinland-Pfalz Tourismus GmbH

[Context & Challenge]

Rheinland-Pfalz Tourismus GmbH has a solid digital infrastructure which facilitates the implementation of various modern technologies. Additionally, the region benefits from strong cooperation and regular information exchanges with its 10 destinations, providing a solid basis for coordination. The existence of crisis communication guidelines further underscores the preparedness of Rheinland-Pfalz Tourismus GmbH to manage potential crises effectively, ensuring the safety of tourists.



**Rheinland-Pfalz Tourismus GmbH**

There are opportunities to further enhance the tourism ecosystem by expanding awareness programs for stakeholders and policymakers regarding risk management and crisis preparedness. This would build upon the existing strong.

There is also an identified need to develop and deploy digital skills development programs targeted to tourism stakeholders to maximize the current technological investments.

The destination is considering ways to enhance its competitiveness, manage seasonality, and adapt to changing preferences and demand for sustainable tourism products, by developing a more diversified tourism offering.

Considering the current context and challenges identified, Rheinland-Pfalz Tourismus GmbH, developed the following actions:

**1. Crisis Communication:**

- Present the objectives and content of the newly developed crisis communication guidelines to the ten destinations in the region.
- Engage in discussions with tourism stakeholders and politicians to review and update these guidelines to meet the specific requirements and needs of each destination.
- Identify additional actions needed and explore potential synergies between the ten destinations to enhance crisis communication efforts across the region.

*Replicability potential: High (it does not require significant resources)*

**2. Sustainability:**

- Develop and implement a framework with clear criteria to support tourism organisations and businesses to create sustainable tourism offering.
- Raise awareness to the added value of being certified with a recognised sustainability label.
- Target tourist segments whose behaviour and preferences include sustainable tourism practices.
- Make an inventory of the existing sustainable mobility offers to communicate it to the local population and guests.
- Strengthen the lobbying activity to expand current sustainable mobility offers, particularly in rural areas.

*Replicability potential: High (it does not require significant resources)*

**3. Digitalisation:**

- Create a dedicated subpage on the Rhineland-Palatinate Tourism Network, focused on risks and crisis management, including best practice examples from the ten regions.
- Provide training opportunities on digital tools to enhance the tourism ecosystem digital capabilities and visitor experience.
- Increase the use of existing digital tools, such as AI-driven chatbots and social media platforms, to improve visitor guidance and enable rapid and effective communication during crisis.

*Replicability potential: Moderate (it requires considerable technical and financial resources to develop AI-Driven solutions)*

[Actions]

[Expected Impact & Lessons Learned]

With the implementation of the actions mentioned above, Rheinland-Pfalz Tourismus is expected to address challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those with similar level (regional) and mandates (marketing & promotion) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

Rheinland-Pfalz Tourismus GmbH

**Improve Resilience and Crisis Preparedness:**

- Establishing a dedicated subpage on risks and crises to share guidance materials and information on the topic enhances the capacity and preparedness of the tourism ecosystem. This subpage can be the centralised information hub, improving coordination and collaboration among tourism stakeholders and facilitating swift actions during emergencies.
- Developing climate-friendly offers enhances the overall sustainability profile of the destinations and will attract environmentally conscious travellers, boosting the region's reputation as a green destination.
- Standardising crisis communication guidelines will promote consistency in messaging and response protocols across the destination. This unified approach enhances transparency, builds trust, and mitigates potential confusion during crises.
- The use of digital tools can significantly improve response capabilities by providing timely information and updates to tourists and stakeholders, thus fostering trust among them.

City of Dubrovnik

[Destination]

Dubrovnik

Dubrovnik stands out as a globally recognised tourism destination renowned for its rich cultural heritage, safety, and attractive natural environment. Its pleasant climate, alongside good air and water quality, enhances its appeal to visitors and residents. Positioned as a university city with a strong brand identity, Dubrovnik enjoys a reputation for clean public spaces and an open, welcoming culture.

Moreover, Dubrovnik's strategic location and strong tourism brand provide a foundation for leveraging its cultural heritage and natural beauty to attract investment and mitigate external threats such as competition from neighbouring countries and climate change impacts.

[Context & Challenge]

The city faces challenges stemming from its **limited physical space and high cost of living**, which are exacerbated by **seasonal tourism** patterns and **inadequate roads and mobility networks**.

Dubrovnik encounters additional obstacles affecting its sustainable development and economic resilience. The **city's infrastructure struggles to accommodate the influx of tourists and the needs of residents**, leading to traffic congestion and reliance on private cars. **Insufficient utility capacity**, such as in the electricity grid, further complicates its development prospects.

[Actions]

Considering the current context and challenges identified, the City of Dubrovnik GmbH, developed the following actions:

**1. Sustainability:**

- Provide incentives and financial support for **sustainable initiatives**, including building energy upgrades, planting tree rows, private solar power plants, and the purchase of electric scooters.

## City of Dubrovnik

*Replicability potential: Low (requires significant financial resources and a mandate that is not usually under destination management organisations)*

## 2. Infrastructure Development:

- Increase **the resilience of existing buildings** utilising available financial (grants, tax breaks, low-interest loans) and technical support (expert advice, resources, tools) to strengthen structures, upgrade materials, improve energy systems, enhance water management, and implement emergency preparedness and evacuation mechanisms.
- **Review regulatory and legislative framework** to facilitate the construction of new roads at the local level, to improve accessibility and drain traffic.
- Build an **underwater tunnel** to **increase mobility options** and **improve accessibility** to Elafiti islands

*Replicability potential: Low (local specificity of the underwater tunnel initiative and requires significant technical and financial resources)*

## 3. Policy & Regulation:

- Apply a **daily tourism tax** and a visitor eco-tax to finance tourism development initiatives, including crisis management and preparedness initiatives (e.g.: retrofitting of infrastructure mentioned above).
- **Regulate the accommodation business**, to ensure safety and quality standards, protect consumer rights, promote fair competition, prevent illegal practices, and support sustainable tourism development in the destination.

*Replicability potential: Moderate (it requires regulatory mandate and strong political will to enforce the implementation of taxes and regulation)*

With the implementation of the actions mentioned above, the City of Dubrovnik is expected to address the challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those with similar level (local) and mandates (regulatory and operational) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

### Improve Resilience and Crisis Preparedness:

- Incentivising sustainable initiatives, such as solar power adoption and grants for electric scooters, contributes to the reduction of carbon emissions and footprint, enhancing environmental sustainability, and improving urban mobility while reducing air pollution.
- Enhancing the resilience of buildings mitigates risks associated with natural disasters and climate change, ensuring **safer urban environments** and the **longevity of urban infrastructures**.
- Implementing tourism and visitor taxes, generate **additional revenue** for local governments, which can be reinvested into sustainable development projects and infrastructure. In this specific case the main objective of this measure is to reduce excessive tourism flows in the main attractions of the destination, which can hinder its future sustainability.
- Regulating the accommodation sector will **improve service quality**, ensure compliance with local standards, and enhance the overall tourism experience, promoting transparent and competitive tourism industry.

[Expected Impact & Lessons Learned]

Municipality of Postojna	
[Destination]	Postojna
[Context & Challenge]	<p>Located in the heart of Slovenia, the Municipality of Postojna has a breathtaking blend of natural wonders and historical treasures. The iconic Postojna Cave and the majestic Predjama Castle stand as testaments to its rich cultural heritage, drawing visitors from around the globe.</p> <p>Beyond these renowned landmarks, Postojna's unspoiled landscapes and a vibrant culinary scene, earned it the recognition of a leading green destination. These assets attract travellers seeking authentic experiences and outdoor adventures in a serene environment. The rising popularity of slow and authentic tourism presents exciting opportunities, especially in niche markets like immersive bike packing experiences.</p> <p>Postojna also faces significant challenges. There are <b>fragmented efforts</b> and <b>lack of engagement among stakeholders</b>, leading to fragmented tourism development and missed opportunities for collaboration in the destination's growth.</p> <p>Moreover, <b>insufficient accommodation and infrastructure</b> further complicate the management of tourist influxes, potentially negatively affecting visitor experiences.</p>
[Actions]	<p>Considering the current context and challenges identified, the Municipality of Postojna, developed the following actions:</p> <p><b>1. Coordination &amp; Collaboration:</b></p> <ul style="list-style-type: none"> <li>• <b>Map out stakeholders</b> to increase cooperation and networking among them for the development of the destination.</li> <li>• Create and organise monthly working sessions with <b>local groups</b>.</li> <li>• Organise <b>fairs</b> and attractive <b>on-sight events</b> not only to increase local engagement but also to <b>promote networking opportunities</b> amongst stakeholders.</li> </ul> <p><i>Replicability potential: High (it does not require significant resources)</i></p> <p><b>2. Infrastructure development:</b></p> <ul style="list-style-type: none"> <li>• Identify the most pressing <b>infrastructure needs</b> and plan the necessary interventions to improve mobility and accessibility.</li> <li>• Create a <b>transportation strategy and promote mobility</b>.</li> <li>• Implement a <b>zero-waste policy</b> for the whole municipality and region.</li> <li>• Find <b>new land for campsites and accommodations</b>.</li> </ul> <p><i>Replicability potential: Low (it requires significant technical and financial resources)</i></p>
[Expected Impact & Lessons Learned]	<p>With the implementation of the actions mentioned above, the Municipality of Postojna is expected to address challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those</p>

**Municipality of Postojna**

with similar level (local) and mandate (operational) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

**Strengthen Governance and Coordination:**

- Mapping stakeholders and increasing cooperation fosters networking and collaborative efforts, leading to the development of **integrated and cohesive strategies** for the destination and the efficient use of resources.
- Monthly engagement with local groups contributes to a deeper **sense of community**, ensuring that local perspectives and needs are considered in tourism development plans.
- Organising fairs and on-site events will boost local engagement, attract visitors, and showcase the destination's offerings, thereby driving tourism and **local economic growth**.

**Improve Resilience and Crisis Preparedness:**

- Addressing pressing infrastructure needs and modernising cleaning and plumbing systems ensures that facilities are resilient and better prepared to resist to events that disrupt infrastructure (e.g. storms).
- Developing a transportation strategy and promoting long-term mobility plans **improves connectivity**, reduce congestion, and support sustainable transportation initiatives, making the destination more attractive and accessible.
- Implementing a zero-waste policy contributes to significantly **reduce environmental impact**, positioning the destination as a leader in sustainability and attracting eco-conscious travellers.
- Identifying and defining the use of new land for campsites and accommodations enables the destinations to **host more tourists**, meeting accommodation offering shortages and addressing growing demand.

**Tourismusverband Linz**

[Destination]

Linz

Linz is a destination with effective communication networks among its partners and a manageable size that facilitates effective collaboration. It has a solid financial foundation and maintains high IT security measures. The city is actively pursuing sustainability, with initiatives like the Green City Initiative and ongoing climate protection efforts. Additionally, Linz's good transportation connections and focus on climate management highlight its commitment to becoming a more sustainable urban area.

[Context & Challenge]

The city's past recognition as the European Capital of Culture and participation in large EU projects offer potential boosts for visibility and growth. Moreover, Linz benefits from low dependency on the main source markets and a strong local market presence, supported by creative marketing and product development focused on sustainability.

Looking ahead, there are opportunities to enhance local business engagement in the tourism ecosystem through both **collaborative processes and digital transformation**.

The city aims to stimulate tourism employment while improving workforce allocation across the business sector.

**Tourismusverband Linz**

[Actions]

Considering the current context and challenges identified, the Tourismusverband Linz, developed the following actions:

**Crisis communication:**

- Create **communication plan** to define and implement a strategy to establish active crisis communication during crisis events.
- Establish an **information channel** in collaboration with the police to provide early alerts about demonstrations.

*Replicability potential: High (it does not require significant resources)*

**Digitalisation:**

- Implement a concept for 24/7 **digital information kiosks** in the city centre and explore the use of QR codes for wider regional access.
- Develop and implement **reporting and data management systems** and define relevant KPIs.

*Replicability potential: Moderate (it requires significant technical and financial resources to implement the digital information kiosks and data management systems)*

**Training and capacity building:**

- Support Upper Austria's **human resource's management strategy** by engaging in activities to attract expatriates and easing their integration process. Also support local businesses in personnel management by exchanging valuable information with them about employee retention and providing training in the Linz Tourism Academy.
- Expand Linz Academy's **training program** to include resilience and other relevant topics to raise awareness among companies and stakeholders on risk prevention, management, and mitigation.

*Replicability potential: Moderate (requires significant human, technical and financial resources to integrate expats and develop training programs)*

**Marketing and promotion:**

- Inform guests about **local attractions** like "Linz for Free" and the Linz Card through enhanced social media campaigns and a dedicated page on the website.
- Promote **travel arrangement flexibility in crisis situations**. For example, if a visitor must change his/her arrangements or make new ones given an unexpected event, this should be possible and enabled by the destination businesses.

*Replicability potential: Moderate (it is expected significant resistance from tourism businesses to the travel arrangement flexibility action)*

[Expected Impact & Lessons Learned]

With the implementation of the actions mentioned above, Tourismusverband Linz is expected to address the challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly those with similar level (local) and mandates (promotional) in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

**Tourismusverband Linz**

**Improve Resilience and Crisis Preparedness:**

- Establishing an information channel improves the coordination and responsiveness of tourism services and their **crisis preparedness**.
- Supporting HR initiatives foster a **resilient and well-trained workforce**, enhancing service quality and staff retention in the tourism ecosystem.
- Promoting effective campaigns on local attractions contributes to diversify tourists’ offering, create greater tourist engagement and improve the value proposition of the destination.

**Facilitate Data Deployment:**

- Implementing data management and reporting systems is crucial to support decision making with data and insights, enabling better destination management, crisis preparedness and management.
- Implementing digital kiosks and QR codes provides **tourists/visitors with constant access to information**, improving their overall experience and engagement with Linz, and increasing their access to updated information in the event of a crisis.

**European Exhibition Industry Alliance**

[Destination]

N.A

The European Exhibition Industry Alliance (EEIA) operates within a well-organised network of associations and maintains strong relationships with its members, institutions, and international actors. This robust network facilitates smooth communication and collaboration within the industry.

The organisation is recognised for its **proactive approach to future challenges**, evidenced by initiatives such as the Net Zero Carbon Events and diversity networks like Women in Exhibitions. EEIA’s substantial industry data and active training programs support its high-quality operations. Additionally, **the industry benefits from a variety of data sources, though these are not always fully integrated or systemic.**

[Context & Challenge]

The exhibitions sector faces significant challenges, particularly a **shortage of skilled professionals and employees**. This talent gap can affect the industry’s ability to innovate and maintain high standards.

There is also a noticeable **lack of awareness about the industry from external perspectives**. This gap in public understanding limits opportunities for growth and recognition.

The regulatory issues pose substantial obstacles. The **bureaucratic burden** is considerable, with complex and costly regulations which are often difficult to navigate. This regulatory environment can be a major hurdle, diverting resources and focus from more productive activities.

[Actions]

Considering the current context and challenges identified the European Exhibition Industry Alliance developed the following actions:

**1. Sustainability:**

## European Exhibition Industry Alliance

- Establish a framework for measuring, monitoring, and reporting carbon emissions with the objective of achieving the **Net Zero initiative goals**.
- Ensure **2030 and 2050 goals are on track** and achieved with collaboration from UFI, EMECA and EEIA.

*Replicability potential: Moderate (it requires significant technical, human and financial resources to achieve Net Zero goals)*

### 2. Data Collection and Analysis:

- Compile existing **data and metrics** the industry's activity, its economic impact and other relevant data connected to industry sectors trade fairs serve, travel and tourism, and emergency/health & safety responses.
- Develop a data collection **platform/dashboard** to centralise information about the sector and create a link with the EU dataspace
- **Incorporate basic industry** data in official EU and national data and statistics. For more accurate representation of the sector, revise the NACE Code definitions.

*Replicability potential: Low (it requires the alignment with national statistics offices and regulatory review to include the sectors' indicators in the official statistics)*

### 3. Strategic planning:

- Distinguish business travel from leisure tourism, coordinate with tourism stakeholders to ensure alignment, and advocate for this distinction at regional, national, EU Levels.
- Continuously advocate to **increase representation of the exhibition sector in EU tourism ecosystem forums** (tourism development and crisis management).

*Replicability potential: Moderate (it requires targeted lobbying and enhanced advocacy efforts to increase the awareness of the sector)*

### 4. Staff Attraction and Retention:

- Analyse **market needs for skills and profiles** and engage with the industry.
- Analyse available **training programs** to consolidate training opportunities, matching the demand with existing initiatives.
- Develop strategy for talent **acquisition and development** (trainings, materials, etc.).

*Replicability potential: Moderate (considering the European scope of the actions, it requires enhanced cooperation)*

[Expected Impact & Lessons Learned]

With the implementation of the actions mentioned above, the European Exhibition Industry Alliance is expected to address challenges identified and wield positive impacts for the tourism ecosystem. Other organisations, particularly cross-border professional associations in the tourism ecosystem dealing with similar challenges, can also leverage valuable lessons:

### Improve Resilience and Crisis Preparedness:

- Implementing a robust carbon emissions framework and achieving Net Zero goals, positions EEIA as a leader in sustainability,



## European Exhibition Industry Alliance

### **enhancing the industry's reputation.**

- Analysing market needs and investing in training programs ensures the industry **attracts and retains qualified professionals**. This strategic approach to talent management supports sustainable growth and innovation within the sector.
- Advocating for the sector's importance within the EU tourism ecosystem and beyond and securing a seat at European tourism forums that discuss tourism development, crisis preparedness, and management ensures that the **sector's views are recognised and considered in policy development and implementation**.

### **Facilitate Data Deployment:**

- Compiling existing data and creating a comprehensive data collection platform or dashboard **improves decision-making** and allow for more **informed strategic planning**.
- Analysing data on emergency and health & safety responses, promotes **better preparedness and response strategies**, improving the sector's ability to manage and mitigate risks effectively.
- Integrating industry-specific data into official datasets, provides better **visibility and recognition** of the sector's economic and social contributions. This advocacy efforts strengthen the industry's influence in policymaking and resource allocation.

## h. Templates

The following pages have blank templates to conduct the above-mentioned exercises.

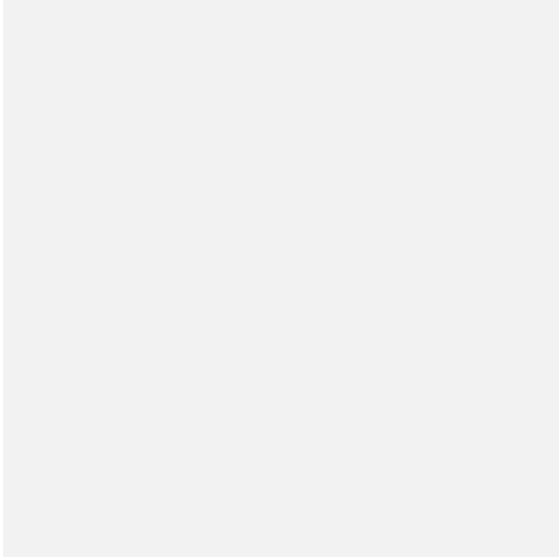
Template 1. Risk Register Table

RISK REGISTER TABLE							
ID	Risk Scenario	Description	Impact	Likelihood	Risk Level	Acceptance criteria	Mitigation measures

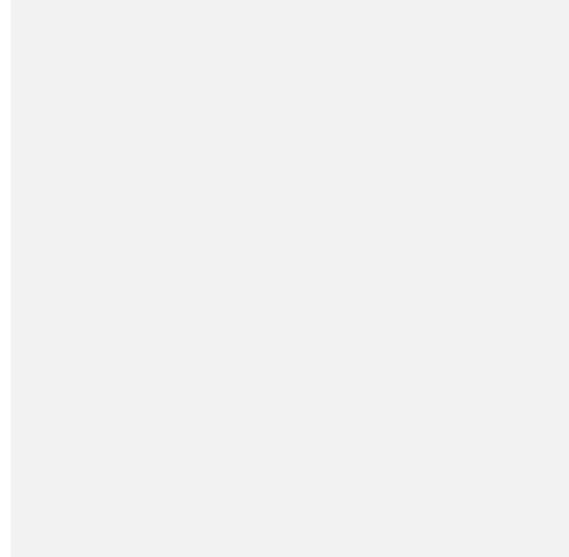
**Template 2. SWOT Analysis**

**SWOT ANALYSIS**

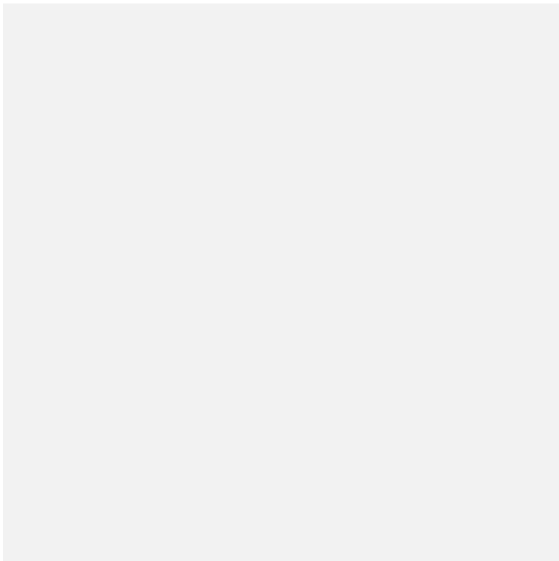
**STRENGTHS**

A large, empty rectangular box with a light gray background, intended for writing the Strengths of the organization.

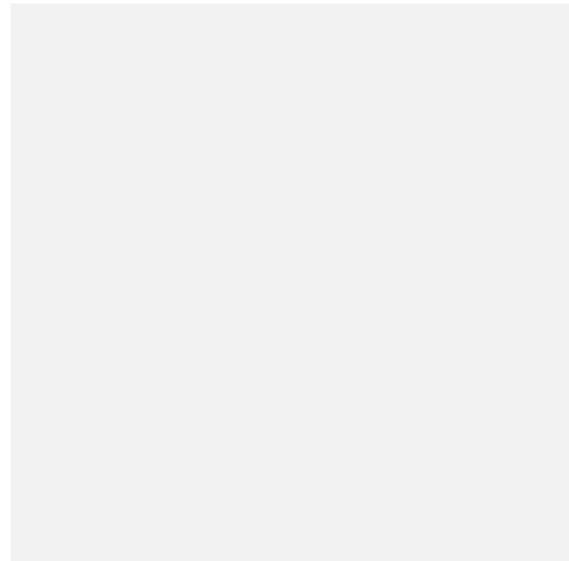
**WEAKNESSES**

A large, empty rectangular box with a light gray background, intended for writing the Weaknesses of the organization.

**OPPORTUNITIES**

A large, empty rectangular box with a light gray background, intended for writing the Opportunities for the organization.

**THREATS**

A large, empty rectangular box with a light gray background, intended for writing the Threats to the organization.

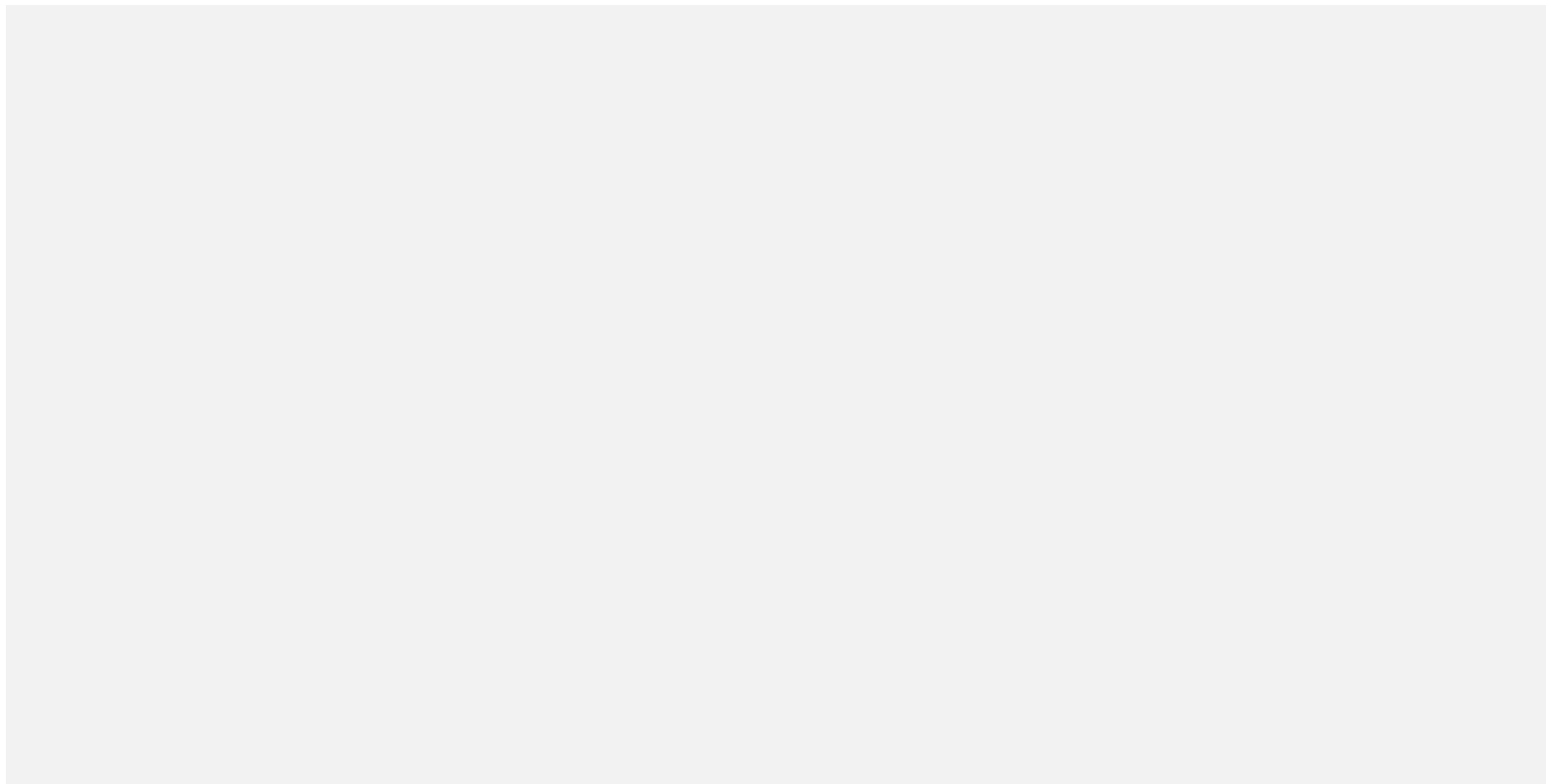
Template 3. Prioritisation matrix



**Template 4. Selection of Actions**

**SELECTED ACTIONS**

**W/ RESPECTIVE CATEGORISATION ON THE PRIORITISATION MATRIX**



**Template 5. Definition of Time Horizons**

<b>DEFINITION OF TIME HORIZONS</b>		
<b>HORIZON 1 (2024-2026)</b>	<b>HORIZON 2 (2027-2029)</b>	<b>HORIZON 3 (2030-onwards)</b>

**Template 6. Action Plan**

<b>IDENTIFICATION OF KEY STEPS</b>			
	<b>HORIZON 1 (2024-2026)</b>	<b>HORIZON 2 (2027-2029)</b>	<b>HORIZON 3 (2030-onwards)</b>



