

# European tourism of the future

Fields marked with \* are mandatory.

## Consultation on the European tourism of the future

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### Objectives of the consultation

Tourism is the 3rd largest economic sector in the EU after trade & distribution and construction. Despite increasing competition, the EU managed so far to remain the world's n°1 tourist destination. Its tourism industry however is confronted with various changes in the EU and the rest of the world - see description in downloadable file below. These (will) have a major impact on the structure of the tourism sector and its activities.

The main objectives of this consultation are twofold: better identify the key challenges and opportunities for the European tourism industry; help revising, if necessary, the Action Plan for the sector adopted by the European Commission in 2010 ([COM\(2010\)352](#)). The European Commission is organising in parallel [another consultation](#) on ways to further reduce the regulatory and administrative burden on the sector, tourism-related public administrations and other tourism stakeholders in the EU.

### Target groups

The consultation is mainly targeting tourism-related businesses, business associations, trade unions, public authorities at all levels, as well as (members of) academic institution, think tanks and NGOs.

**Contact:** [ENTR-TOURISM-SURVEYS@ec.europa.eu](mailto:ENTR-TOURISM-SURVEYS@ec.europa.eu)

**Responsible service:** European Commission, DG Enterprise and Industry, Tourism and cultural instruments Unit - Avenue d'Auderghem 45 - B-1049 Brussels - Belgium

### Protection of personal data

[http://ec.europa.eu/geninfo/legal\\_notices\\_en.htm](http://ec.europa.eu/geninfo/legal_notices_en.htm)

[EU tourism of the future - background document 2013.doc](#)

## 1. Respondent profile

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**1.1. You are / belong to\***

- Micro or small enterprise (up to 49 employees, turnover less than €10 million)
- Medium enterprise (from 50 to 249 employees, turnover less than €50 million)
- Large enterprise (250 or more employees; turnover over €50 million)
- Regional business association
- National business association
- European business association
- National trade union
- European trade union
- Regional or local public body (administration ...)
- National public body (administration ...)
- Multi-national/ European public body
- Academic institution or think tank
- Non Governmental Organisation
- Other (specify)

mainly responsible for

- tourism policy-making
- tourism promotion

**1.2. Name\***

**1.3. Job title**

**1.4. Name of the entity you represent**

where appropriate

**1.5. Email address**

to contact you in case we need to clarify some of your answers

1.6. In which country are you / your entity based?\*

- EU country
- Other (specify):

\*

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Greece
- Germany
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovenia
- Slovakia
- Spain
- Sweden
- United Kingdom

\*

**1.7. On which market are you mainly active?**

Select one or more\*

- Tourism in general
- Adventure tourism
- Business tourism
- Cultural tourism (including industrial heritage)
- Eco-tourism (cycling, horse-back riding, hiking ...)
- Educational tourism (school trips, seminar vacation, study abroad experience ...)
- Fishing / hunting tourism
- Gastronomic tourism
- Health & wellness tourism
- Nature tourism
- Social tourism
- Other

Please specify

**1.8. What are your main types of activity?**

Select one or more\*

- Accommodation
- Attractions (theme park, ...)
- Marketing & advertising
- Meeting, conference & events organisation
- On-line booking intermediation
- Restaurants & cafés
- Tour operator
- Training
- Transport
- Travel agent
- Other

Please specify

### 1.9. Do you consent to the publication of your reply and name?

Contributions to public consultations are normally made public together with personal data, unless you say otherwise. Please indicate your choice below.\*

- We / I consent to the publication of this reply, personal data included
- We / I consent to the publication of this reply in an anonymous form
- We / I do not consent to the publication of this reply

## 2. Challenges & opportunities

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**2.1. Assess the likely impact of the following challenges for your business in the next 5 to 10 years**  
from 1 (not concerned) to 5 (very serious concern)

	1	2	3	4	5
<i>Seasonality</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>find skilled professionals</i> (linguistic skills, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>keep skilled professionals</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>cope with IT</i> developments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing <i>competition from other EU</i> destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing <i>competition from non-EU</i> destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing request for <i>customized experiences</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing request for <i>new products</i> (diversification)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Climate change</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Other environmental sustainability</i> threats (scarcity and pressure on natural resources and habitats)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Socio-cultural sustainability</i> threats (e.g. absorption capacity of a local population to cope with a large number of tourists with very different cultural habits ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Safety</i> threats (safety of accommodations ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Security</i> threats (criminality and terrorists attacks ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory & administrative burden for businesses (difficulty to get visas, ...). See also <a href="#">consultation on regulatory and administrative burdens</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism-related <i>taxation</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify

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**2.2. How important could the following opportunities be for your business?**

from 1 (no important at all) to 5 (very important)

	1	2	3	4	5
Repositioning on <i>senior</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on the <i>youth</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on the <i>family</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>domestic</i> tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>non-EU tourists from developed economies</i> (such as USA, Japan, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on non-EU tourists from <i>EU neighbouring economies</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>non-EU tourists from emerging economies</i> (Brazil, China, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Greater use of <i>IT developments</i> (e-commerce platform ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Greening</i> businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify

### 2.3. How do you intend to exploit these opportunities?

Select one or more

- Developing new products / services
- Increasing the quality of existing products / services in general
- Giving a larger share to “real” experiences
- Increasing the accessibility of sites / accommodation / modes of transport
- Decreasing the price of existing products / services
- Developing all-inclusive but more customised packages
- Improving your website (e.g. by offering more precise and up-to-date information)
- Developing new marketing approaches (e.g. use of social networks ...)
- Finding new distribution channels (e.g. franchising ...)
- Other

Please specify

## 2.4. Explain concretely how you would exploit these opportunities

**Supplying tourism services usually require the collaboration of many actors. They form a value chain. Some categories of suppliers are stronger for various reasons. They are for instance in a position to pass on increases in energy costs to their customers while other have to reduce their profit margin. The following questions help identify which sub-sectors are particularly vulnerable or performing particularly well, how much leverage they have when buying and selling ...**

## 2.5. How strong are you when negotiating with your main suppliers?

Score from 1 (I have to accept their terms and conditions whatever they are)

to 5 (my main suppliers have to accept my terms and conditions whatever they are)

	1	2	3	4	5
Negotiating with <i>main suppliers</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## 2.6. How strong are you when negotiating with your main customers?

Score from 1 (I have to accept their terms and conditions whatever they are)

to 5 (my main suppliers have to accept my terms and conditions whatever they are)

	1	2	3	4	5
Negotiating with <i>main customers</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## 2.7. Between your suppliers and customers, are you

- suffering
- securing enough revenues *to continue* your activities (status quo)
- securing enough revenues *to expand* your activities
- Don't know

**2.8. Between your suppliers and customers, where do you see yourself in 5 to 10 years from now?**

- suffering
- securing enough revenues *to continue* your activities (status quo)
- securing enough revenues *to expand* your activities
- Don't know

**2.9. Which sectors are the biggest winners in the “tourism value chain”?**

Select one or more\*

- Accommodation (hotels, ...)
- Attractions (theme park, ...)
- Marketing & advertising agencies
- Meeting, conference & events organisers
- On-line booking companies
- Restaurants & cafés
- Tour operators
- Trainers
- Transporters
- Travel agents
- Other
- Don't know

Please specify

Please specify the transport sector (aviation, train, ...)

## 2.10. Which sectors are likely to be the biggest winners in 5 to 10 years?

Select one or more\*

- Accommodation (hotels, ...)
- Attractions (theme park, ...)
- Marketing & advertising agencies
- Meeting, conference & events organisers
- On-line booking companies
- Restaurants & cafés
- Tour operators
- Trainers
- Transporters
- Travel agents
- Other
- Don't know

Please specify

Please specify the transport sector (aviation, train, ...)

## 2. Challenges & opportunities

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**2.1. Assess the likely impact of the following challenges for your sector in the next 5 to 10 years**  
from 1 (not concerned) to 5 (very serious concern)

	1	2	3	4	5
<i>Seasonality</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>find skilled professionals</i> (linguistic skills, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>keep skilled professionals</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>cope with IT</i> developments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing <i>competition from other EU</i> destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing <i>competition from non-EU</i> destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing request for <i>customized experiences</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing request for <i>new products</i> (diversification)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Climate change</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Other environmental sustainability</i> threats (scarcity and pressure on natural resources and habitats)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Socio-cultural sustainability</i> threats (e.g. absorption capacity of a local population to cope with a large number of tourists with very different cultural habits ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Safety</i> threats (safety of accommodations ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Security</i> threats (criminality and terrorists attacks ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory & administrative burden for businesses (difficulty to get visas, ...). See also <a href="#">consultation on regulatory and administrative burdens</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism-related <i>taxation</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify

**2.2. How important could the following opportunities be for your sector?**

from 1 (no important at all) to 5 (very important)

	1	2	3	4	5
Repositioning on <i>senior</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on the <i>youth</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on the <i>family</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>domestic</i> tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>non-EU tourists from developed economies</i> (such as USA, Japan, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on non-EU tourists from <i>EU neighbouring economies</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>non-EU tourists from emerging economies</i> (Brazil, China, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Greater use of <i>IT developments</i> (e-commerce platform ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Greening</i> businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify

**2.3. How does your sector intend to exploit these opportunities?**

Select one or more

- Developing new products / services
- Increasing the quality of existing products / services in general
- Giving a larger share to “real” experiences
- Increasing the accessibility of sites / accommodation / modes of transport
- Decreasing the price of existing products / services
- Developing all-inclusive but more customised packages
- Improving your website (e.g. by offering more precise and up-to-date information)
- Developing new marketing approaches (e.g. use of social networks ...)
- Finding new distribution channels (e.g. franchising ...)
- Other

Please specify

## 2.4. Explain concretely how your sector would exploit these opportunities

**Supplying tourism services usually require the collaboration of many actors. They form a value chain.** Some categories of suppliers are stronger for various reasons. They are for instance in a position to pass on increases in energy costs to their customers while other have to reduce their profit margin. The **following questions help identify which sub-sectors are particularly vulnerable or performing particularly well, how much leverage they have when buying and selling ...**

## 2.5. How strong is your sector when negotiating with its main suppliers?

Score from 1 (I have to accept their terms and conditions whatever they are)

to 5 (my main suppliers have to accept my terms and conditions whatever they are)

	1	2	3	4	5
Negotiating with <i>main suppliers</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## 2.6. How strong is your sector when negotiating with its main customers?

Score from 1 (I have to accept their terms and conditions whatever they are)

to 5 (my main suppliers have to accept my terms and conditions whatever they are)

	1	2	3	4	5
Negotiating with <i>main customers</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## 2.7. Between its suppliers and its customers, is your sector

- suffering
- securing enough revenues *to continue* your activities (status quo)
- securing enough revenues *to expand* your activities
- Don't know

**2.8. Between its suppliers and its customers, where do you see your sector in 5 to 10 years**

- suffering
- securing enough revenues *to continue* your activities (status quo)
- securing enough revenues *to expand* your activities
- Don't know

**2.9. Which sectors are the biggest winners in the “tourism value chain”?**

Select one or more\*

- Accommodation (hotels, ...)
- Attractions (theme park, ...)
- Marketing & advertising agencies
- Meeting, conference & events organisers
- On-line booking companies
- Restaurants & cafés
- Tour operators
- Trainers
- Transporters
- Travel agents
- Other
- Don't know

Please specify

Please specify the transport sector (aviation, train, ...)

## 2.10. Which sectors are likely to be the biggest winners in 5 to 10 years?

Select one or more\*

- Accommodation (hotels, ...)
- Attractions (theme park, ...)
- Marketing & advertising agencies
- Meeting, conference & events organisers
- On-line booking companies
- Restaurants & cafés
- Tour operators
- Trainers
- Transporters
- Travel agents
- Other
- Don't know

Please specify

Please specify the transport sector (aviation, train, ...)

## 2. Challenges & opportunities

---

**2.1. Assess the likely impact of the following challenges for the European Tourism Industry in the next 5 to 10 years**

from 1 (not concerned) to 5 (very serious concern)

	1	2	3	4	5
<i>Seasonality</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>find skilled professionals</i> (linguistic skills, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>keep skilled professionals</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficulty to <i>cope with IT</i> developments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing <i>competition from other EU</i> destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing <i>competition from non-EU</i> destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing request for <i>customized experiences</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing request for <i>new products</i> (diversification)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Climate change</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Other environmental sustainability</i> threats (scarcity and pressure on natural resources and habitats)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Socio-cultural sustainability</i> threats (e.g. absorption capacity of a local population to cope with a large number of tourists with very different cultural habits ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Safety</i> threats (safety of accommodations ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Security</i> threats (criminality and terrorists attacks ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory & administrative burden for businesses (difficulty to get visas, ...). See also <a href="#">consultation on regulatory and administrative burdens</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism-related <i>taxation</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify

**2.2. How important could the following opportunities be for the European Tourism Industry?**

from 1 (no important at all) to 5 (very important)

	1	2	3	4	5
Repositioning on <i>senior</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on the <i>youth</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on the <i>family</i> market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>domestic</i> tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>non-EU tourists from developed economies</i> (such as USA, Japan, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on non-EU tourists from <i>EU neighbouring economies</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Repositioning on <i>non-EU tourists from emerging economies</i> (Brazil, China, ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Greater use of <i>IT developments</i> (e-commerce platform ...)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Greening</i> businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify

### 2.3. How should the European Tourism Industry exploit these opportunities?

Select one or more

- Developing new products / services
- Increasing the quality of existing products / services in general
- Giving a larger share to “real” experiences
- Increasing the accessibility of sites / accommodation / modes of transport
- Decreasing the price of existing products / services
- Developing all-inclusive but more customised packages
- Improving your website (e.g. by offering more precise and up-to-date information)
- Developing new marketing approaches (e.g. use of social networks ...)
- Finding new distribution channels (e.g. franchising ...)
- Other

Please specify

#### 2.4. Explain concretely how these opportunities could be exploited

*Supplying tourism services usually require the collaboration of many actors. They form a **value chain**. Some categories of suppliers are stronger for various reasons. They are for instance in a position to pass on increases in energy costs to their customers while other have to reduce their profit margin. The **following questions help identify which sub-sectors are particularly vulnerable or performing particularly well, how much leverage they have when buying and selling ...***

#### 2.5. Which sectors are the biggest winners in the “tourism value chain”?

Select one or more\*

- Accommodation (hotels, ...)
- Attractions (theme park, ...)
- Marketing & advertising agencies
- Meeting, conference & events organisers
- On-line booking companies
- Restaurants & cafés
- Tour operators
- Trainers
- Transporters
- Travel agents
- Other
- Don't know

Please specify

Please specify the transport sector (aviation, train, ...)

## 2.6. Which sectors are likely to be the biggest winners in 5 to 10 years?

Select one or more\*

- Accommodation (hotels, ...)
- Attractions (theme park, ...)
- Marketing & advertising agencies
- Meeting, conference & events organisers
- On-line booking companies
- Restaurants & cafés
- Tour operators
- Trainers
- Transporters
- Travel agents
- Other
- Don't know

Please specify

Please specify the transport sector (aviation, train, ...)

## 3. Priorities for future EU policy and actions

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### 3.1. What should the EU do by priority to support the competitiveness of its tourism industry?

Select one or more\*

- Regulatory environment
- Investment
- Support to the promotion & development of tourism products
- Better knowledge of the evolution of the sector
- Better governance of the sector

### **Regulatory environment**

Please score the following actions sector from: 1 (not a priority) to 5 (top priority)

	1	2	3	4	5
Visa facilitation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality standards (accommodation, accessibility...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agreements with non-EU countries (e.g. memorandum of understanding on the cooperation between this country and the EU on tourism issues ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please specify

### **Investment**

Please score the following actions sector from: 1 (not a priority) to 5 (top priority)

	1	2	3	4	5
Research and innovation for tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support the development / reinforcement of large clusters and networks (European Enterprise Network ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Better energy efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Better infrastructures for accessibility (transports)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training schemes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobility schemes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to finance schemes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please specify

**Support to the promotion & development of tourism products**

Please score the following actions sector from: 1 (not a priority) to 5 (top priority)

	1	2	3	4	5
<i>EU branding</i> (promoting Europe as a unique and high quality destination ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>New European products</i> in general to diversify EU offer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European <i>products around cultural and industrial heritage</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>gastronomy</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>festivals</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>adventure</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>eco-tourism</i> (cycling, horse-back riding, hiking ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>health and wellness</i> (spas ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>social tourism</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>educational</i> tourism (school trips, seminar vacation, study abroad experience ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>fishing / hunting</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European products around <i>nature</i> (wild life observation ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Synergies between tourism and <i>creative industries</i> (advertising, IT, arts & crafts, luxury goods, ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please specify

**Better knowledge of the evolution of the sector**

Please score the following actions sector from: 1 (not a priority) to 5 (top priority)

	1	2	3	4	5
<i>European statistics</i> showing the importance of the sector in terms of growth and jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Other European statistics</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Development of <i>common indicators</i> (e.g. for the sustainable management of tourist destinations, competitiveness, innovation ..)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analytical <i>reports</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please specify

**Better governance of the tourism sector**

Please score the following actions sector from: 1 (not a priority) to 5 (top priority)

	1	2	3	4	5
<i>Setting up an EU tourism platform with all key European industry stakeholders to monitor trends and make recommendations</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Setting up a high level group of independent tourism policy experts to monitor trends and make recommendations</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Encouraging European sectoral associations to maintain an open and modern management structure</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Supporting the coordination between the various levels of public authorities</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Benchmarking / publicising and exchanging good practices</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Other</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please specify

**3.2. Could you roughly estimate the benefits of what you see as the most important priority?**

Select one level or more

- for my company
- for my sector of activities at national level
- for my sector of activities at EU level
- for the EU tourism industry in general

For my company,  
from (€)

to (€)

For my sector at national level,  
from (€)

to (€)

For my sector at EU level,  
from (€)

to (€)

For the EU tourism industry in general,  
from (€)

to (€)

## Comments and Suggestions

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Respondents may upload a file developing in more details their vision for the future of the European tourism sector