

Tourism recovery through cooperation – a macro-regional approach

EU Tourism – towards sustainable recovery

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Ramune GENZBIGELYTE-VENTURI, Policy officer for Tourism Tourism, Textiles and Creative Industries Unit (F4)

DG GROW

Industrial Ecosystems in Europe

- · Social enterprises, associations and cooperatives aiming at generating a social impact, often proximity based Proximity
- · Retail sales
- Wholesale connected to consumers

- · Passenger transport and travel
- · Hotels, short term accommodation
- · Restaurants and catering
- Events, theme parks

Tourism Creative & & Social Cultural Economy **Industries**

- · Newspapers, books and periodicals
- · Motion picture, video and television
 - · Radio and music

Aerospac e & Defence

- Aircraft production
- · Space manufacturing and services
- · Defense products and technologies

· Production of textiles, wearing

- Building of residential and non-residential estates
- Building of roads and railways,
- · Building of utilities and civil engineering
- · Associated activates

Construction

Digital

Retail

- Telecommunications
- Software publishing, computer programming and consultancy
- Data processing, hosting, web portals
- Manufacturing of computers, communication equipment and consumer electronics
 - · Pharmaceuticals and other medical products
 - Personal protective equipment
 - Medical services, hospitals, nursing homes, residential care

Health

- Plant and animal production

Ecosystems for the Recovery

Industrial

Electronics

 Raw starting materials (semiconductor) wafers)

apparel, footwear, leather and, jewellery

- Semiconductor manufacturing tools
- · Design and manufacturing of semiconductor components
- Mobility -Transport -Automotive

Energy-Intensive

Industrie

- Production of motor vehicles, ships and trains, and accessories
- · Their repair and maintenance
- Transport

- · Processing of food
- Agri-Food
- Renewabl e Energy
- Electric motors, engines and turbines
- · Electric power generation
- · Manufacturing and distribution of gas

- Raw materials
- · Manufacturing of products with high environmental impact: chemicals, iron and steel, forest-based products, plastics, refining, cement, rubber, non-ferrous metals, fertilisers, etc.



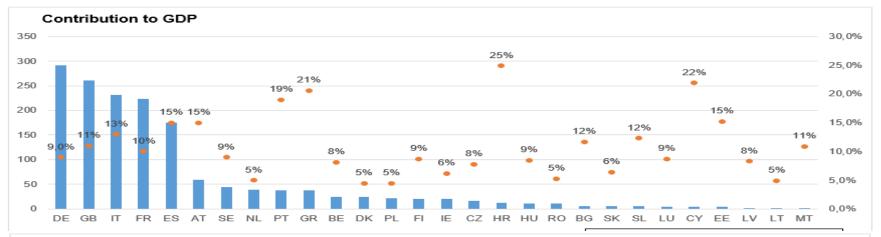


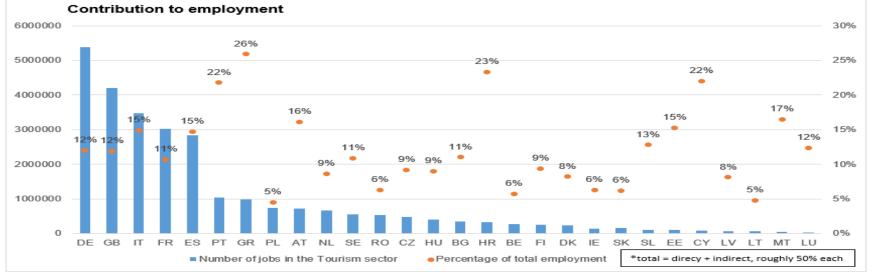
Tourism ecosystem





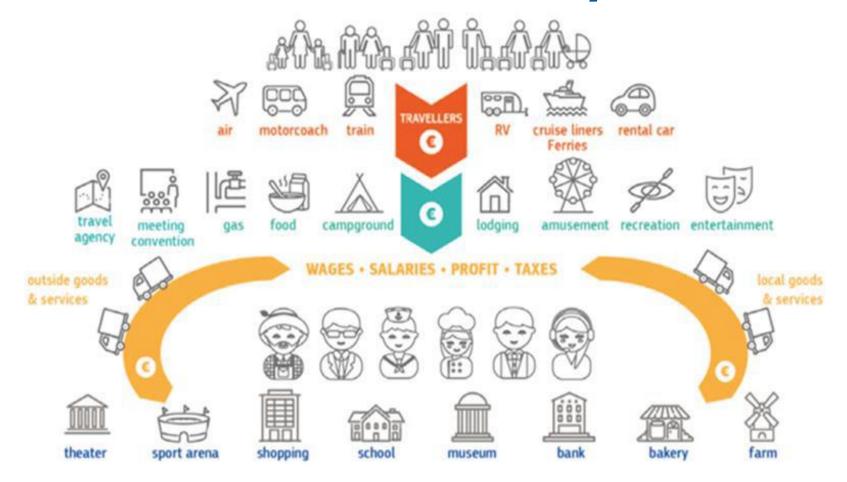
Travel and Tourism Economic Total* Impact 2019 (2018 figures)







Visitor economy





Covid-19 global impacts on Tourism



UN World Tourism Organisation estimates a **60% reduction in international tourism**



EUR 840-1000 billion in losses for global travel industry



Covid-19 impacts on EU Tourism



60% to 90% reduction in bookings compared to similar periods in previous years



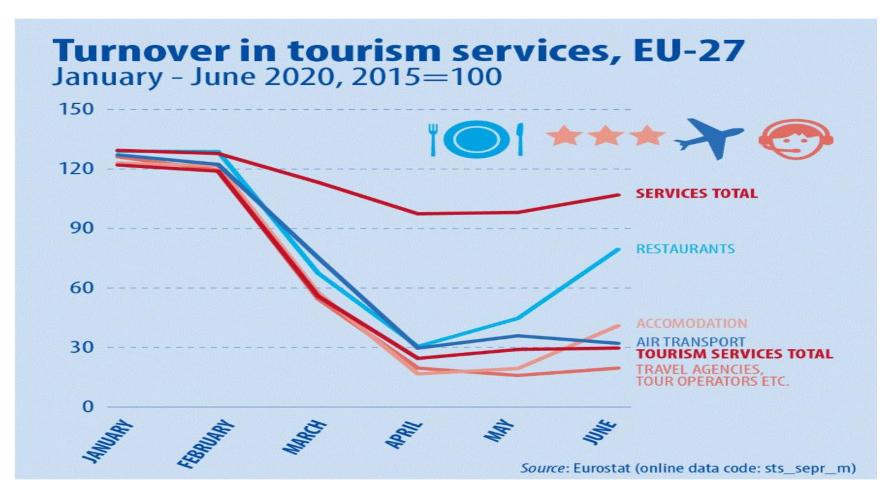
Estimated loss of 6 million jobs



Significant estimated **loss of revenue**:

- 85% hotels and restaurants
- 85% for tour operators
- 85% for long distance rail
- 90% for cruises and airlines







EU Tourism – June-August 2020

Negative turnover in bookings continued impacting revenues and jobs in all segments of the ecosystem

Steep fall in demand for international trips compared to domestic trips

Uncertainty for medium to long-term recovery



First reaction - supporting immediate needs (liquidity and jobs)

- Temporary Framework for State Aid measures
- Coronavirus Response Investment Initiative (CRII)
- Encouraging collaboration between regions: new pilot for interregional partnership on sustainable and digital tourism
- Temporary Support to mitigate Unemployment Risks in an Emergency (SURE)
- European Globalisation Adjustment Fund

EU Coronavirus response team:



Commission Communication Tourism and transport in 2020 and beyond





Commission Communication Tourism and transport in 2020 and beyond

Safely restore free movement and reopen our internal borders

Guidance on restoring freedom of movement and lifting of internal border controls

- Safely restore transport and connectivity Guidance on transport
- Safely and resuming tourism services
 Guidance on tourism, in particular hospitality establishments
- Address the liquidity crunch and rebuild consumer confidence

Recommendation on vouchers



The road to sustainable recovery working together

Build confidence among citizens, stimulate demand

Restarting the tourism ecosystem

European Agenda for Tourism 2050



Build confidence among citizens & businesses

- coordinated approach to travel restrictions (IPCR)
- easy access to reliable information (Re-open EU)
- sanitary protocols for tourism businesses
- promotion campaigns ('We are Europe' /Euronews)

Restart the tourism ecosystem

- protect businesses and jobs
- build **economic resilience** for businesses and regions
- **green transition** (tourism infrastructure, connectivity, carbon-neutral mobility, circular business models)
- digital transition (digitalisation level, access to data, capacity building)
- resilient workforce (Pact on skills)



Tourism ecosystem in 2020 and beyond

European Tourism Convention (12 October)



roadmap towards sustainable, innovative & resilient tourism ecosystem

European Agenda for Tourism 2050