EU guide on data for tourism destinations 2 EU guide on data for tourism destinations This document was prepared for the European Commission – DG GROW by Smart Tourism Destinations SI2.843962 PresentedbyPwCEUServicesEESV,IntelleraConsulting,CARSAandtheUniversityofMalagatothe EuropeanCommission,Directorate-GeneralforInternalMarket,Industry,EntrepreneurshipandSMEs Thiscontentisforgeneralinformationpurposesonly,andshouldnotbeusedasasubstituteforconsultationwithpro fessionaladvisors.AccordingtotheEuropeanCommission,smarttourism "respondstonewchallengesanddemandsinafast- changingsector,includingtheevolutionofdigitaltools, productsandservices,equalopportunityandaccessforall visitors,sustainabledevelopmentofthelocalarea,and supporttocreativeindustries,localtalentandheritage". EU guide on data for tourism destinations Abilitytocollect,curateandre-usetouristicdatain accordancewithacoherentstrategicplan.Thegoalistohelp peopleandorganizationsinmakingdecisionsandtaking actionsthatmaximisethebenefittotheorganization. Tourism data management Destination Management Organisation (DMO) Tourism accessibility Tourism sustainability Organisationwhichcoordinatesthemanyconstituent elementsofthetourismecosystem;contributingtothe destinationdevelopmentconsideringresidentsand stakeholdersinterestsandwellbeing.TheDMOmayprovide visitorservicesandthenecessaryinformationstructureto marketthedestinationinamostdemocraticway. Theabilityoftourismandtraveltobeaccessibletoall people,irrespectivelyofage,socialconditionsorofanytype ofdisability-temporaryorpermanent.Includesaccessibility inthephysicalenvironment,intransportation,information andcommunicationsandotherfacilitiesandservices. Theabilityofatourismecosystemofpreservingitsnatural andculturalresources,promotingthewellbeingoflocal communities,mitigatingtheseasonalityofdemand,limiting theenvironmentalimpactoftourism-relatedactivities, supportingaccessibilityandimprovingthequalityof tourismjobs. Integrationofglobalandcurrentdataanalyticstoinform thedecisionmakingprocessforthetourismsector.The purposeistoreduceuncertaintybyusinginformation obtainedfromamanydatasources,eveninrealtime. Travel intelligence Open Data Informationcollected,producedorpaidforbythepublic bodiesandmadefreelyavailableforre-useforanypurpose. Itisbuiltaroundthekeypillarsoftheinternalmarket:free flowofdata,transparencyandfaircompetition. Tourism ecosystems Therangeofstakeholdersinvolvedinthetourismsector.It includesnotonlypublicadministrationandprivate businesses,butalsoinnovationlabs/hubs,universitiesand researchcentres,innovationaccelerators/incubatorsand localinhabitants. Smart environments Smartenvironmentsuseambienttechnologies(sensors, telecomsnetworks,IoTandAIs)toprovidesustainable resourceefficienciesandnewinsightsintooperationsfrom complexdatatofirmsandtheirstakeholders. Key definitions Main trends in the tourism sector Three megatrends to predict the evolution of data use for tourism EU guide on data for tourism destinations Smartdestinationsarecontinuouslyevolvingintheir provisionofservicestotourists,followingsocio- demographic,cultural,technological,environmentaland politicalchangesthataffectallareasofsociety.Beingaware ofandunderstandingthesedevelopmentsinthetourism sectoriskeytoplantourismdevelopmentstrategies, especiallyintheattemptofadoptingsmarttourism approacheswhichrequirenotonlyinvestmentin technologiesbutalsoculturalchangesinDMOandacross

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theentiretourismecosystemsotoallowthetransitionfrom 3Stourism("sea,sun,andsand")to3Etourism("education, entertainment,andexperience").Onthemediumterm,evolutionsofcurrenttechnologies combinedwiththestructuraladoptionofnewtechnologies thatarenowreachingthenecessarymaturitystage,will makesmarttourismincreasinglypossibleandaccessiblefor bothDMOsandend-users.InternetofThings(IoT),for instance,willreachanewstageofdevelopment,notonly becauseofthecostofsensors,devicesandrelatedsoftware isprogressivelydecreasing,butalsobecauseofthehigher complementarityandinteroperabilityofthesystems involved.Inthiscontext,increaseddatainteroperability, coupledwithimproveddataprivacyandsecurity,willfoster widespreaddatasharingandre-use.Cybersecuritywill becomeincreasinglyimportantforbothdestinationsand usersandtechnologysolutionsproviderswillneedtoadapt tonewregulatoryconstraintsandguidelines.Atthesame time,furtherdevelopmentinmachinelearningandneural networksareexpectedtounlockthepotentialofother technologiesalsointhetourismsector.Anexampleofthis isAugmentedReality(AR),currentlymostlylimitedtothe gamingsector,butwithhugepossibleapplicationsalsoin thetourismindustry,toofferincreasinglyimmersiveand dynamicexperiences.Whilewehavemadeeveryattempttoensurethattheinformationcontainedinthisdocumen thasbeenobtainedfromreliablesources,PwC,Intellera Consulting,CARSAandtheUniversityofMalagaarenotresponsibleforanyerrorsoromissions,orfortheresultsob tainedfromtheuseofthisinformation.All informationinthisdocumentisprovided"asis",withnoguaranteeofcompleteness,accuracy,timelinessoroftheresultsobtainedfromtheuseofthis information,andwithoutwarrantyofanykind,expressorimplied,including,butnotlimitedtowarrantiesofperformance,merchantabilityandfitnessfora particularpurpose. InnoeventwillPwC,IntelleraConsulting,CARSAandtheUniversityofMalaga,itsrelatedpartnershipsorcorporations,orthepartners,agentsoremployees thereofbeliabletoyouoranyoneelseforanydecisionmadeoractiontakeninrelianceontheinformationinthisdocumentorforanyconsequential,specialor similardamages,evenifadvisedofthepossibilityofsuchdamages. TheprojecthasreceivedfundingfromtheEuropeanCommissionunderservicecontractpilotproject"SmartTourismDestinations"-GROW-2020-OP-0014- NumberSI2.843962 Theinformationandviewssetoutinthisdocumentarethoseoftheauthor(s)anddonotnecessarilyreflecttheofficial opinionoftheCommission.The Commissiondoesnotguaranteetheaccuracyofthedataincludedinthisstudy.NeithertheCommissionnoranyperson actingontheCommission'sbehalfmay beheldresponsiblefortheusewhichmaybemadeoftheinformationcontainedtherein.1 EU guide on data for tourism destinations 2 3 6 9 11 Allovertheworldtourismdestinationsarecontinuously investinganddevelopingnewstrategiestoincreasetheir appealtowardsprospectvisitorsandbettermanage tourismflows.Tothisend,manydestinationmanagement organisations(DMOs)decidedtopursuethestatusof

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smartdestination,byfosteringinnovationandtheuptake ofdata-drivensolutionstoenhancetheirownandlocal stakeholdersofferandbusinessstructure,developingnew andmoresustainableformsoftourism,whilebroadening theirapproachto'destinationmanagement'.Thelatterhas beenoftendonebycreatingsynergieswithwider'smart city'programmes-e.g.,bysharingtechnologiesinitially usedformobilitypurposesonly,adaptingthemalsoto tourism-specificpurposesandgeneratingeconomiesof scale-orbyestablishinglong-termpartnershipswiththe privatesector.Onthelongterm,theparalleldevelopmentofdata interoperability,AI-poweredsolutionsandbigdata processingcapabilities,willallowtoincreasinglymakethe tourismmanagementaccurateandefficientandtourism experiencesseamlessandpersonalized.Blockchain-based solutionshavethepotentialtoincreasethesecurityand transparencyofdataandinformationsystems.The metaversewillofferopportunitiesforimmersiveeducation andentertainmentexperiences.Improveddatasecurity systemscoupledwithamoreadvancedandencompassing regulatoryframeworkaregoingtosupportthewidespread embeddingofbiometricsandrecognitionsystemsinto tourists'life.Developmentsinrobotics-combinedwithAI forautonomousmovementorlanguageprocessing-are alsoexpectedtoproducesomeimpactinthetourism servicesandhospitalitysector.Onalongtime-horizon conciergeandreceptiontaskscouldbeexecutedby chatbotsandrobots,aswellasassistancetoe.g.,tourists withlimitedmobilitycouldbeprovidedthroughrobotsor autonomousvehiclesystems.4 Main trends in the tourism sector EU guide on data for tourism destinations Megatrend 2 -Socio-demographic changes Anageingpopulationandprogressivelyhigherratesof digitalliteracyrepresenttwodefiningdemographictrendsfor thenext30years.Regardingageingpopulations,theshareof olderindividualsinthetotalglobalpopulationisexpectedto increasesignificantlyinthecomingdecades.Thesetrends needtobetakenintoaccountbothfromtheperspectiveof targettouristsandlabourmarket.Forexample,thefive primarygenerationsalivetodayaretheBabyBoomers,born intheperiod1946-1964;GenerationX,borninthеperiod 1965-1980;Millennials,borninthеperiod1981-1996;and finally,GenerationZ,whichincludestheindividualsbornin theperiod1997-2012.Inthiscontext,ontheshortrun,itcanbeobservedthat5G and6Gmobilenetworkswillplayapivotalroleinaddressing thegrowingdemandforspeed,coverageandqualityof networksaswellastosupportbigdataandcloud-based solutions,fedbyagrowingnumberofdatasetsgeneratedby sensorsandIoTapplications.Bigdatasolutionsarealreadyin useinseveraldestinationstosupportdecision-makingand thiscentralityisexpectedtoincrease,alsoinlightofgrowing awarenessofthebenefitsofdatasharingandtheadoption ofcommonstandards.Destinations,ontheshortterm,will alsohavetowidentheirabilitytoprocessdatacollected throughvoluntarydatacaptureandrecommendation systems.Suchdata-generallycollectedthroughonlineforms orbeaconscommunicatingwithtourismapps-iscrucialto

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designpredictiveandbehaviouralmodelsbasedonuser profilesaswellastomakepersonalisedrecommendations.Why this EU guide Table of content Asmarttourismdestinationisdefinedasadestinationwhere differentstakeholders,eventuallyunderthecoordinationofa DestinationManagementOrganisation,facilitateaccessto tourismandhospitalityproducts,services,spaces,and experiencesthroughICT-basedinnovativesolutions,making tourismsustainableandaccessible,andfullyleveragingtheir culturalheritageandcreativity.Thisentailsaddressingand improvinglocalpopulations'qualityoflife,astheybenefit fromasustainablesocio-economicdevelopmentandare activelyinvolvedinthedigitalculturefosteredinthearea.Thisguideondatafortourismdestinationsmight thereforeresultusefulforanytypeofdestinationwilling toimprovethewaytheycollectandusedatafortourism purposesandhopefullybecomeinspirationalforthose cities,regions,orcountries,eagertostarttheirjourney .towardsbecomingsmarttourismdestinations

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