

Smart Tourism visions and ambitions: emerging strategies and governance models

11st November 2022



Pillar 1 webinar: Strategy and Governance



intellera
consulting

pwc

CARSA



Experts:

Stefan Hartman

Dagmar Lund-Durlacher

Agenda – 11 November 2022



11:30 – 11:35	Welcome and Objectives	Antonio Collado	<i>Senior consultant, CARSA, Spain</i>
11:35 – 11:45	Introduction to Pillar 1 – Strategy and Governance	Stefan Hartman	<i>Head of department at European Tourism Futures Institute (ETFI), NHL Stenden University, The Netherlands</i>
11:45 – 12:00	Subtopic 1: <i>Destination governance in times of change</i>	Stefan Hartman	<i>Head of department at European Tourism Futures Institute (ETFI), NHL Stenden University, The Netherlands</i>
12:00 – 12:15	Subtopic 2: <i>Ensuring effective Smart Tourism monitoring in Destinations</i>	Dagmar Lund-Durlacher	<i>Professor, Eberswalde University of Sustainable Development, Germany Institute for Tourism Sustainability Vienna, Austria</i>
12:15 – 12:25	Q&A session	Experts + Core team	
12:25 – 12:30	Next steps	Antonio Collado	<i>Senior consultant, CARSA, Spain</i>



Note: To ask questions for the Q&A session, please use the button:

Ask a question

I. Write question!
II. Write your name and submit!

The Smart Tourism Destinations project



Promoted by the **European Commission - DG GROW**, the Smart Tourism Destinations Project is managed by **Intellera Consulting**, **CARSA**, the **University of Malaga**, and **PwC EU Services**.



The project aims to **support EU destinations implementing data-driven approaches to make tourism more sustainable and accessible**.



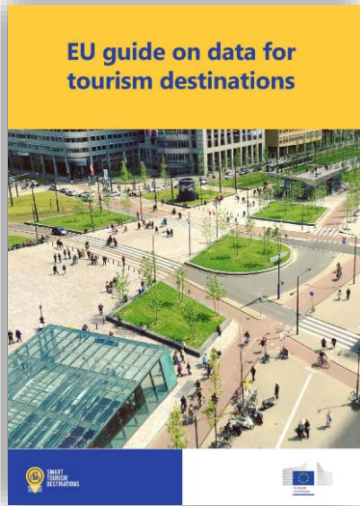
The project can also count on the support of **10 independent experts** including private sectors practitioners and academic researchers.

SELECTED DESTINATIONS

48 Destinations have been selected to be part of the Project, having the possibility to **learn from experts and peers** and work on **their Smart Tourism Destination's Roadmap**.



Resources from the project



EU Guide on data for tourism destinations

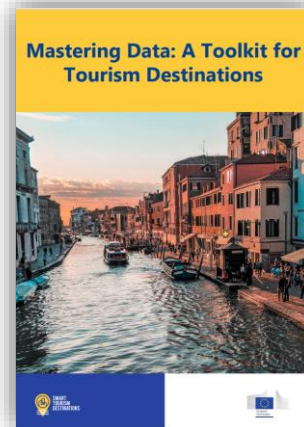
This guide on data for tourism destinations might therefore result useful for any type of destination willing to improve the way they collect and use data for tourism purposes and hopefully become inspirational for those cities, regions, or countries, eager to start their journey towards becoming smart tourism destinations.



Study on mastering data for tourism by EU destinations

The study provides an **analysis of the state of the art on the use of data in the tourism sector** in Europe and across the world. In addition, it offers a series of recommendations to catalyse the use of data by European destinations to improve their tourism offer.

Available for download on the project website:
<https://smarttourismdestinations.eu/digital-library>



Mastering Data: A Toolkit for Tourism Destinations

Stay tuned!
To be published soon!



Welcome and objectives

Key objectives of the webinar:



It is the first of a **series of webinars dedicated to the five pillars** of the Smart Tourism Destinations Toolkit: all aiming to explore subtopics, share insights and latest trends, and learn from the experts .



Particularly, this webinar supports **knowledge sharing in selected subtopics of Pillar 1: “Strategy and Governance”**, providing examples linked to different maturity stages of Smart Tourism Destinations.



The webinar series forms part of the project’s aim to sustain and foster the **development of a data-driven community, active in the Tourism sector in the European Union**, where tourism destinations representatives, experts and other stakeholders can meet and share their knowledge, experiences and solutions

The five pillars of a Smart Tourism approach

The five pillars of a Smart Tourism approach:



Introduction to Pillar 1 – Strategy and Governance



Expert:

Dr. Stefan Hartman

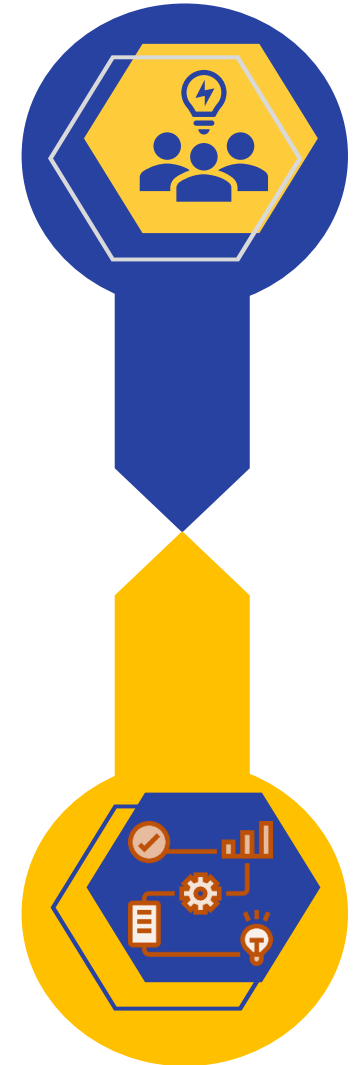
*Head of department at European Tourism Futures Institute (ETFI),
NHL Stenden University, The Netherlands*



Pillar 1 Introduction



- Governance is the way in which rules, norms and actions are structured, sustained, regulated and held accountable.
- Hence, governance may take many forms, driven by many different motivations and with many different results
- Governance structures enable destinations to steer development, shape adequate structures and processes, and support interaction among stakeholders.
- Strategy: informs in which direction to steer development (what, how, when, who)
- Relevance of governance and strategy for smart tourism destinations? **Important for the ability to gain and use knowledge from data!**

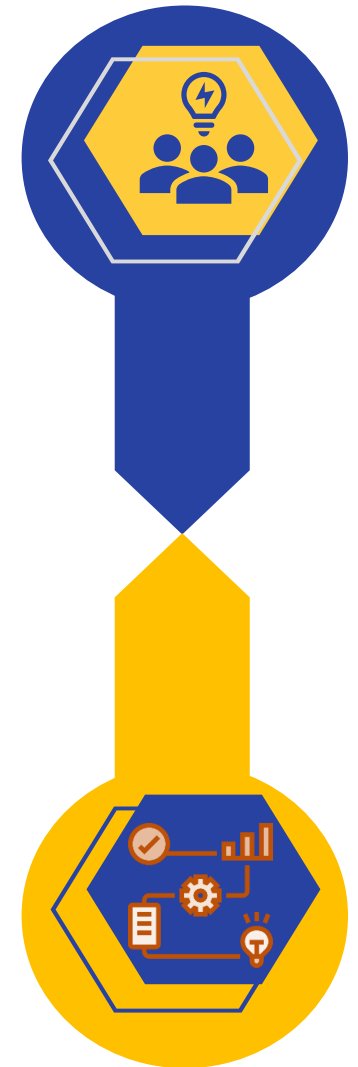


Pillar 1 Introduction



Governance and strategy. So what about ...

- Goals and objectives? Focus?
- Roles & responsibilities? Mandate?
- Stakeholder engagement? Engage the residents and even tourists in tourism policy and decision-making...?
- Resource availability?
- Role and use of data? A tool to monitor progress towards the goals and provide guidance to strategic readjustments?



Evolution-in-progress: stages of destination maturity



Key attributes of Smart Tourism strategy and governance

	STAGE 1: "Smart Marketing"	STAGE 2: "Smart Management"	STAGE 3: "Smart Stewardship"
FOCUS of general tourism approach	Marketing	Marketing, management	Marketing, management, facilitating collaboration, knowledge sharing
GOALS of general tourism approach	Economic development	Sustainable development	Regenerative Tourism
PRIORITY AREA of data collection	Planning and booking	Planning, booking and staying Managing tourism flows and tourists' experience	Supporting the tourists' experience through the whole journey Destination resource management Well-being of residents and communities Innovation of products and services
STRATEGY of general tourism approach	Attract visitors, focus on volume	Manage stakeholders, focus on quality Efficient resource use	Added value for businesses, residents and tourists Focus on value and experience co-creation Spread visitors in time and space Enhance destination for residents and tourists Enhance well-being of community
Data management strategy	Limited strategic importance, left to individuals, largely for reporting	Data awareness is present. There is an increasingly widespread understanding of the value of data and a data management strategy	Data awareness is omnipresent. Data is considered crucial for decision-making. The data management strategy is tailored precisely to that end. Collaborations for data management exist.
Indicators	Quantitative - focused on tourists (No. Of tourists, average length of stay,...)	Qualitative -focused on tourists and businesses (satisfaction)	Focused on quality of experience, life and performance Carrying capacity management Resource utilisation and replenishment

Subtopic 1

Destination governance in times of change

Expert:

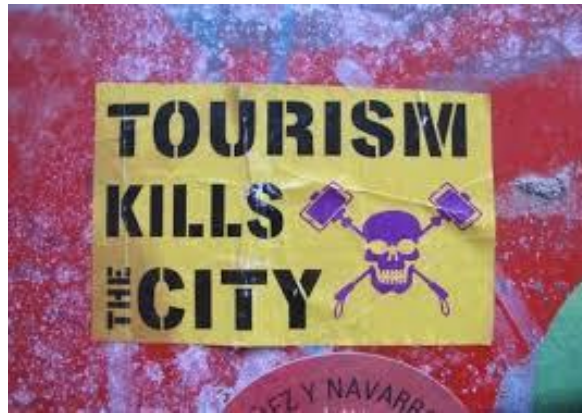
Stefan Hartman

*Head of department at European Tourism Futures Institute (ETFI),
NHL Stenden University, The Netherlands*

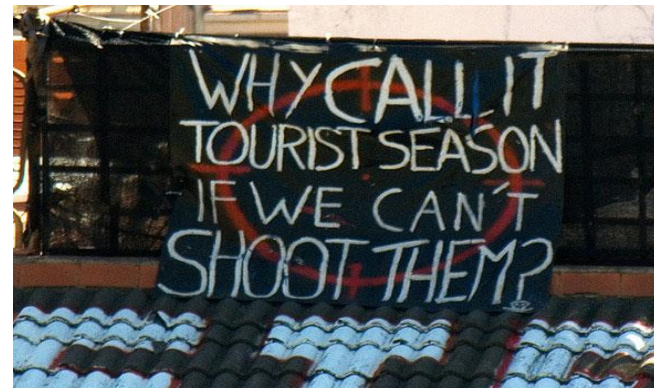


**I
hate
love
you.**





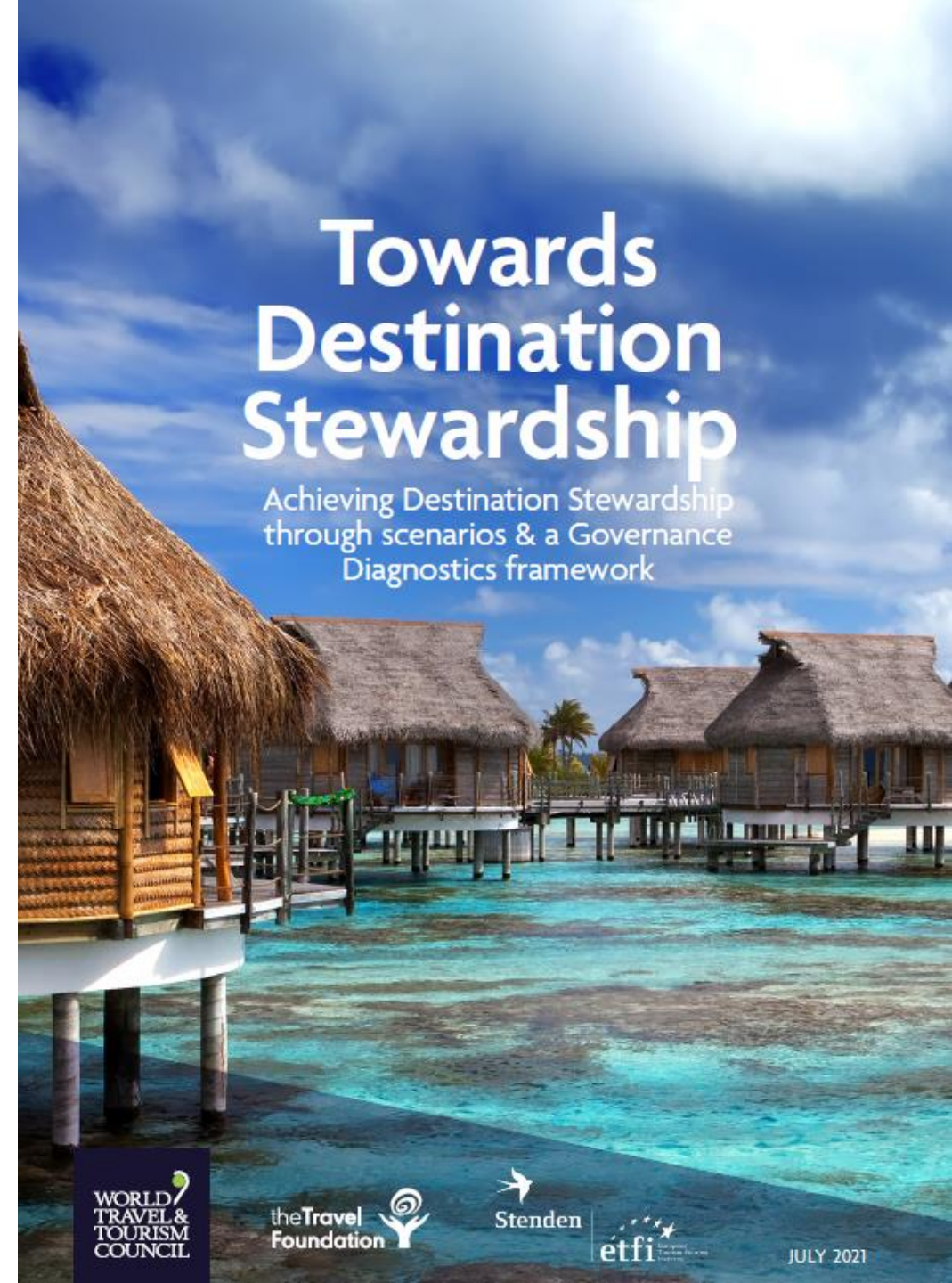
Limits to growth?



Emerging concepts

- Responsible destinations
- Regenerative tourism
- Destination Stewardship
- Conscious Travel
- Resilient destinations
- Circular events / circular hospitality
- ..

*“create better places for people to live in,
and better places to visit”*



Towards responsible destinations

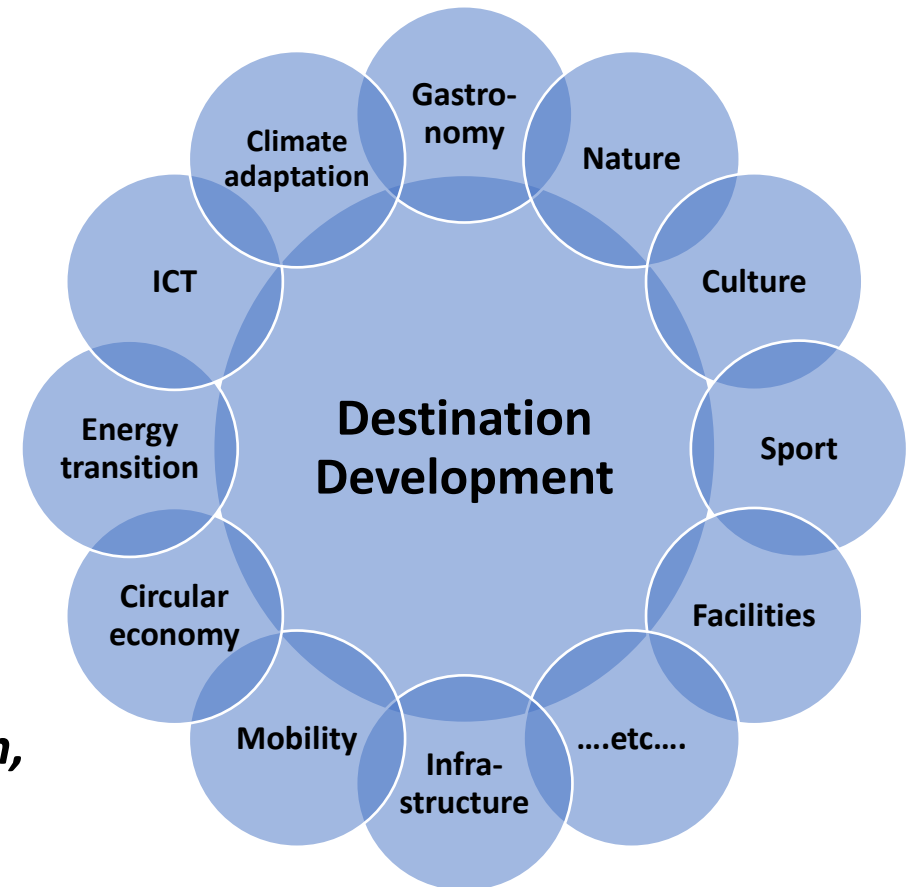
to: responsible (adaptive) destinations

Via: the (untamed) growth

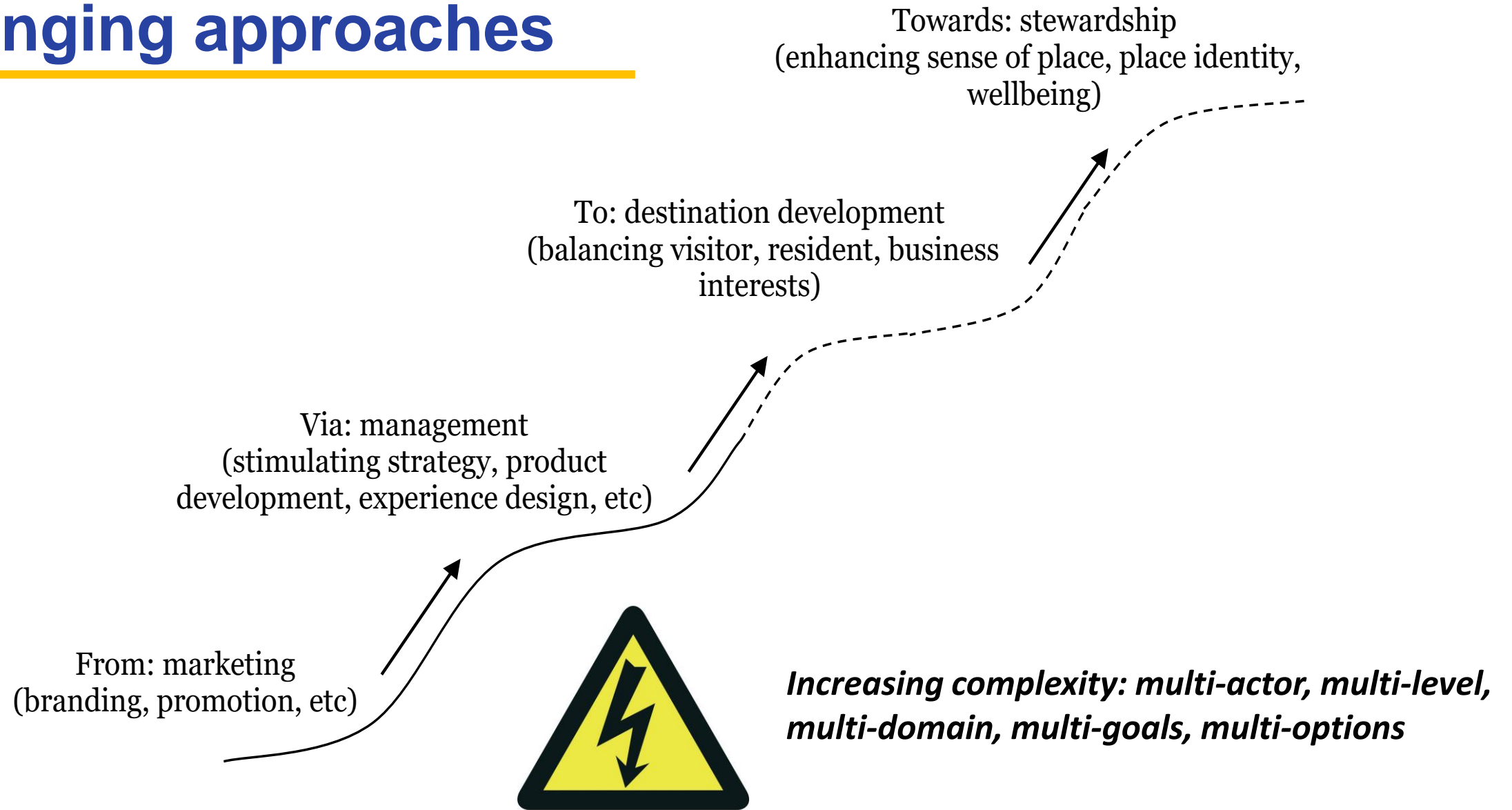
From: 'the discovery'



***Complexity: multi-actor,
multi-level, multi-domain,
multi-goal, multi-option***



Changing approaches



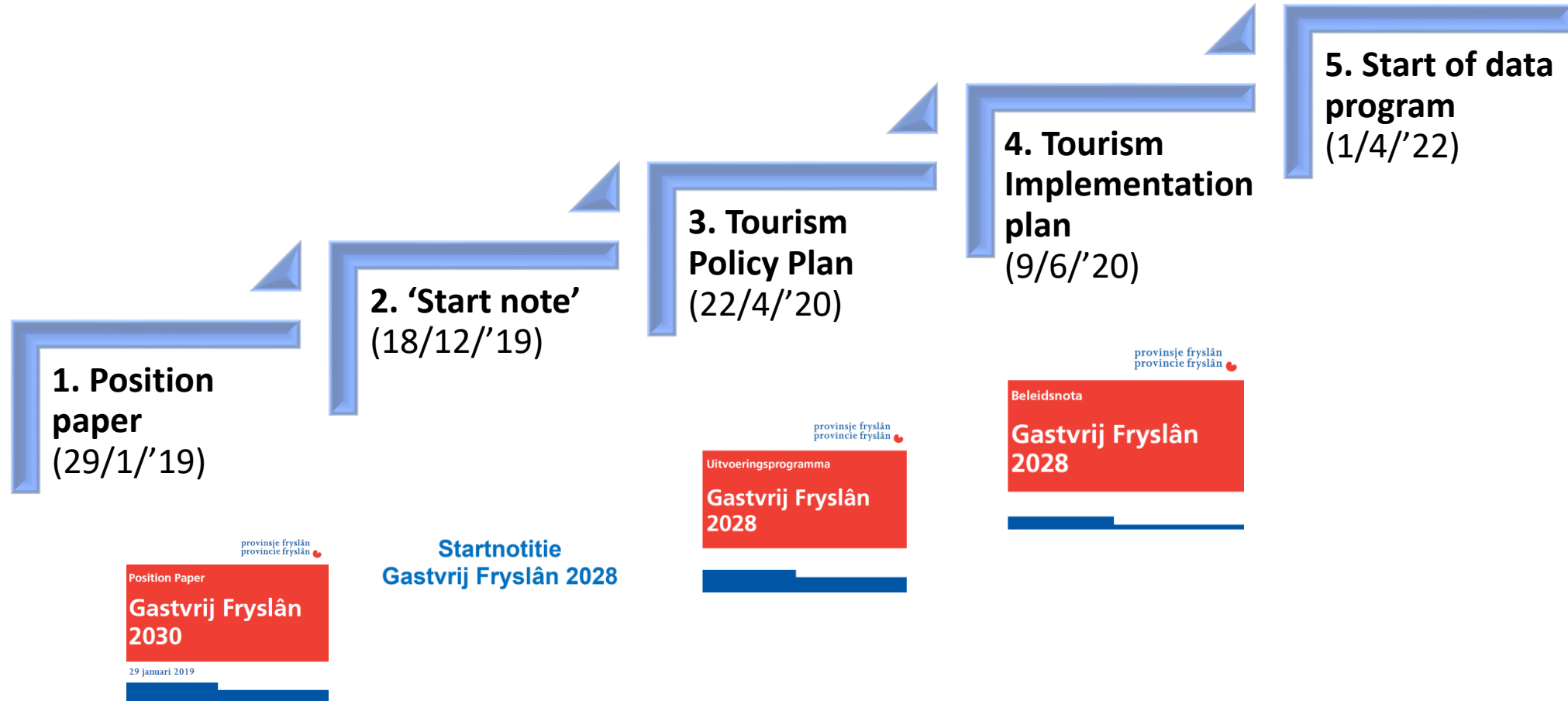
Changes in approaches

Source:
CELTH (2022, p. 12) Agenda Conscious Destinations

https://www.celth.nl/sites/default/files/2022-04/Agenda%20Conscious%20Destinations%20april%202022_0.pdf

Different approaches of the hospitality domain	The domain as opportunity	Growth of the domain as the goal	The domain as a threat	Optimising the domain
Attitude towards hospitality domain	The hospitality domain as a niche activity, as something unique, promising, as opportunity	The hospitality domain as full domain, as a goal, as engine for employment	The hospitality domain as a threat, cause of nuisance (culprit)	The hospitality domain as a means (as regenerative force) and as integral theme
Attitude towards destination	Destination as untapped, rough diamond	Destination as exploitable source	Destination in danger	Destination as (potential) cohesive, vital, and resilient system
Attitude towards the visitor	Unique occurrence, a phenomenon	Walking money bag	Source of nuisance (culprit)	Stakeholder, temporary (co-) inhabitant
Attitude towards the residents	Incidentally confronted with tourists: leads to interest, wondering, and (for some) seeing potential	Profits from the hospitality domain through income and employment	Experiences nuisance or hinder (victim)	Stakeholder, joint user of the leisure offering, experiences pros and cons
Attitude towards development	The hospitality domain as indicator of change or transition-in-progress	The hospitality domain as growth diamond: focus on numbers, euros, more is better, 'boosterism'	The hospitality domain as a problem that must be stopped	Development of the hospitality domain is a delicate subject. Approach like a transition process: consciously guiding towards new future situation. Conscious of actual impact and price
Attitude towards success (KPIs)	N/A	Growth	Impact	Optimisation of the social value
Attitude towards education programmes	No specific programmes	Educating for the growth of the domain	Educating for the management of the domain	Educating for the social value of the domain

Meanwhile in Friesland: “Gastvrij Fryslân 2028”



Meanwhile in Friesland: “Gastvrij Fryslan 2028”

By 2028, every inhabitant benefits from tourism

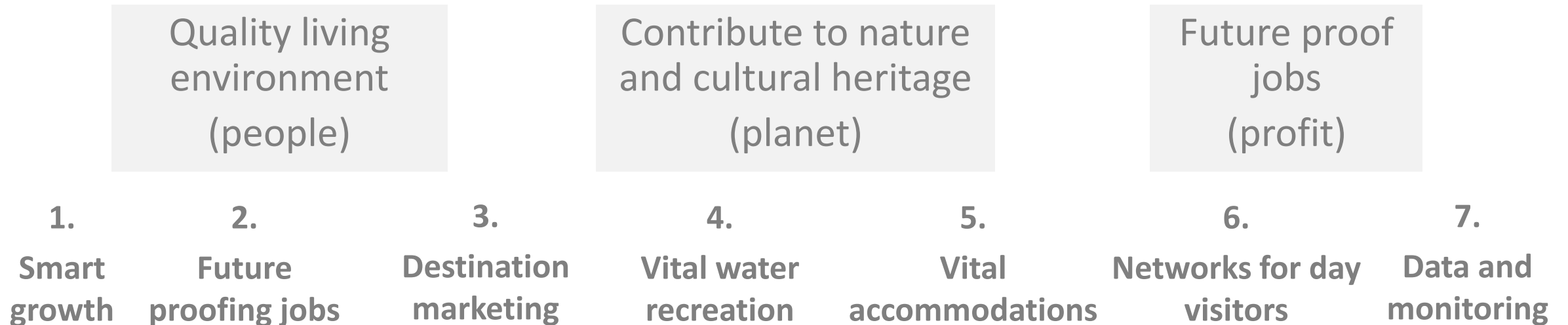
Quality living
environment
(people)

Contribute to nature
and cultural heritage
(planet)

Future proof
jobs
(profit)

Meanwhile in Friesland: “Gastvrij Fryslan 2028”

By 2028, every inhabitant benefits from tourism



Who? ‘System organizations’: Provincie Fryslan, Merk Fryslan (DMO), Recreatieschap Marrekrite, industry associations (HISWA-Recron, KHN), Toerisme Alliantie Fryslan (TAF), Ynbusiness, NHL Stenden/ETFI

How? co-created provincial program & implementation plan + ‘Captains Table’

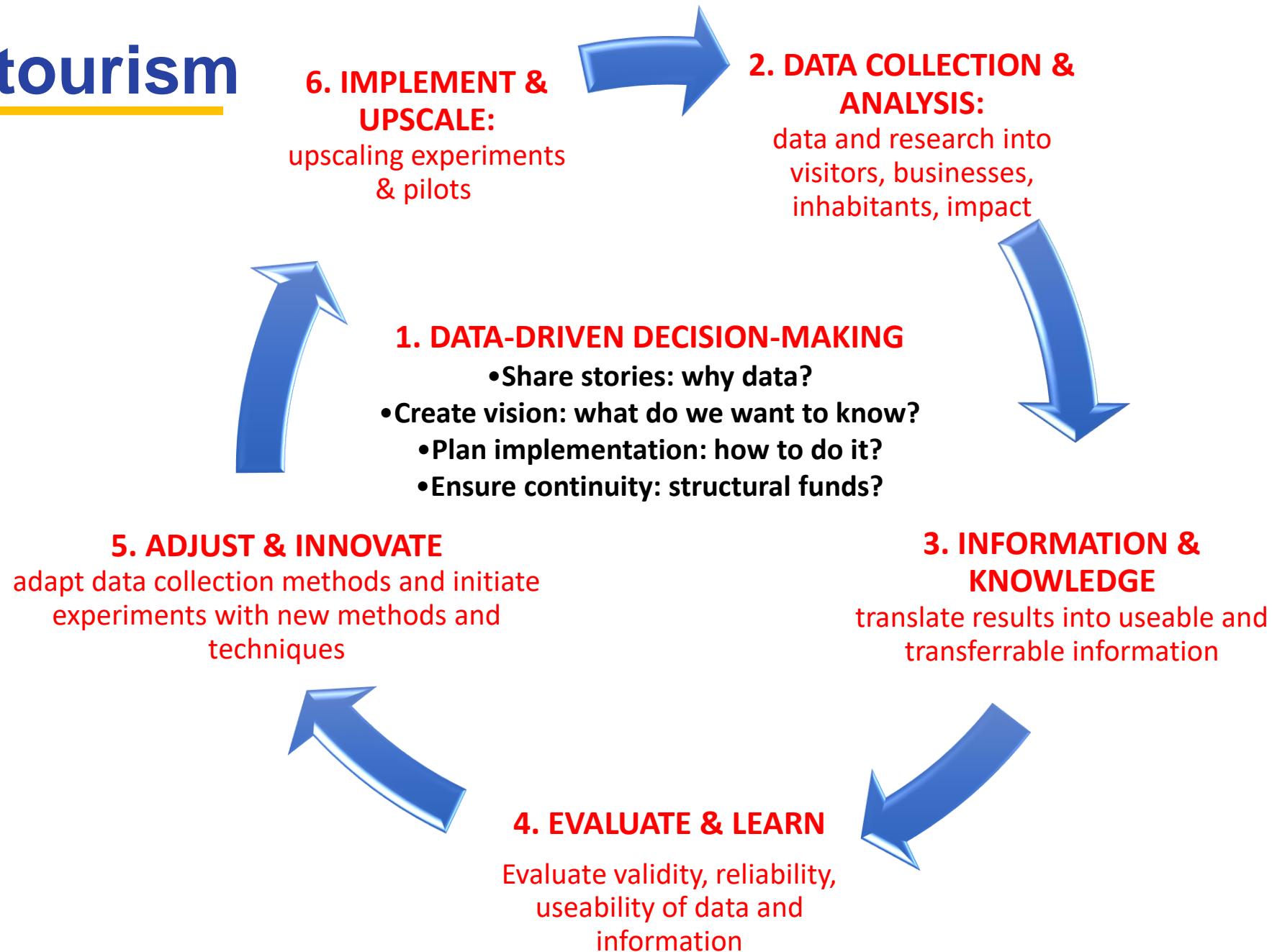
Cycle of destination development

Observations

- New planning models needed
- New policies for 'balance'
- Need to build productive coalitions of actor-networks
- ...no single, fixed approaches
- ...always limited resources
- ...resourceful (policy) entrepreneurs needed



Cycle of smart tourism



Connecting regional initiatives

- National Data Alliance -> PPS
- Visitor economy network -> Public sector
- Knowledge Network Destination Netherlands -> DMOs
- Center of Expertise Leisure Tourism Hospitality -> Education
- National Tourism Summits -> PPS
-



Ensuring effective Smart Tourism monitoring in Destinations

Expert:

Dagmar Lund-Durlacher

Professor, Eberswalde University of Sustainable Development, Germany

Institute for Tourism Sustainability Vienna, Austria



Why create indicators?

Indicators are considered as useful **tools** to.....

- Diagnose the tourism situation of the destination
- Use the indicator system to design and implement models that focuses on the smart tourism destination approach
- Identify and evaluate issues that need to be addressed to improve the level of "smartness" of the tourist activities
- Formulate general action plans at a destination level
- Define short-term strategies for the destination
- Establish procedures for monitoring and benchmarking the destination over time and across destinations



Criteria for the selection of indicators

- **Relevance** with regard to the destination's specificity and tourism situation as well as strategic goals
- **Frequent** in existing sets of smart tourism indicators
- **Data availability** at destination level
- **Timeliness**
- **Credibility** of the information and **reliability** for users of the data
- **Clarity and understandability** to users
- **Comparability** over time and across destinations
- **Number of indicators**
- **Funds** for data collection and analyses (monitoring over time)



Indicator framework for smart tourism

From basic tourism indicators to indicators reflecting the **pillars of a smart destination**.

Environmental Impact Indicators	Socio-economic vulnerability indicators	Digitalisation indicators
Basic tourism descriptors	Governance indicators	Accessibility indicators

Own illustration based on EU Dashboard and Ivars-Baidal et al. (2021)

Sources: Eurostat (2022) EU Tourism Dashboard (<https://tourism-dashboard.ec.europa.eu/?lng=de&ctx=tourism>).
Ivars-Baidal, J. et al. (2021): Sustainable tourism indicators: what's new within the smart city/destination approach?, Journal of Sustainable Tourism.

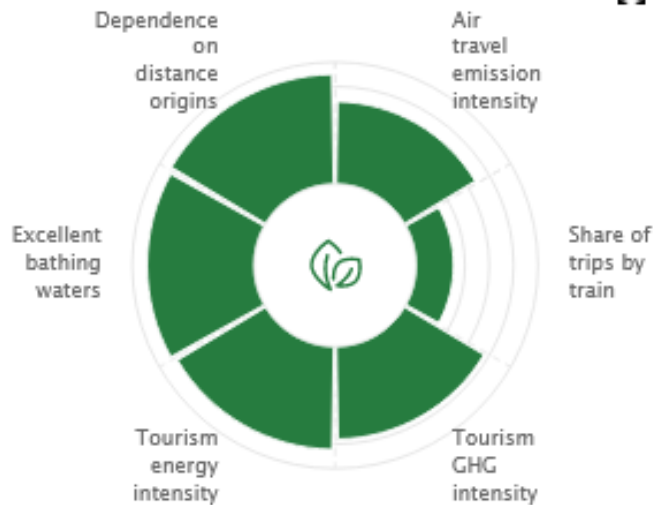


Tool: EU Tourism Dashboard

Overview of indicators per policy pillar

Environmental impact (index)

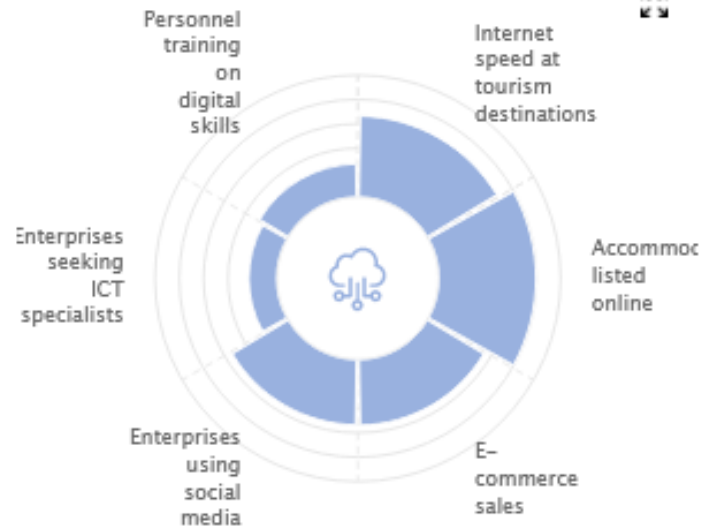
2021



● EU27 ● Countries

Digitalisation (index)

2021



● EU27 ● Countries

Socio-economic resilience (index)

2021



● EU27 ● Countries

<https://tourism-dashboard.ec.europa.eu/?lng=en&ctx=tourism>

Tool: Manual on sustainable development indicators of tourism (Eurostat)

Core set of Sustainable Development Indicators for Tourism

Driving Forces

1. Number of beds in hotels and similar establishments
2. Number of trips by means of transport
3. Tourism-related employment (% of total empl.)
4. Household consumption expenditure on tourism
5. Tourism share of GDP

Pressure

6. Number of tourist overnight stays in various types of accommodation
7. CO₂-emissions from energy use in tourism facilities
8. Water use by tourists, per person and day in relation to use by residential population
9. Generation of municipal waste by tourists
10. Discharge of sewage water due to tourism

State

11. Areas used for specific leisure activities, e.g.: marinas, golf courses, ski areas etc., time series
12. Areas covered by forest and other wooded land (%), time series
13. Protected land and water areas (% of land area in tourist regions), time series

Impact

14. Tourists exposed to noise in hotel and similar establishments
15. Bathing Water Quality, time series

Response

16. Sewage water treatment plants -volumes of water treated- time series
17. Percent of tourist business establishments participating in recognized environmental schemes
18. Expenditure to maintain/restore cultural and historical heritage
19. Eco-labeled tourism facilities (as % of total)
20. Existence of land use or development planning processes, specifically referring to tourism activities

INDICATOR: 8

Water use by tourists, per person and day, in relation to use by residential population

Pressure

Description: Total use of fresh water by tourists and for tourism activities, as part of the total water use in the society.

Objective: The demand of water is large during the warm season, not only for the natural environment but also for growing crops and for people. This often coincides with periods of shortage of water. The indicator makes possible calculations of the extra demand on water resource with increased no. of tourists arriving within a certain region

Geographical coverage: National, regional, local (if data are available)

CALCULATION TOOL¹

$$\frac{\text{Total use of fresh water}}{(\text{No. of residents} \times 365) + \text{No. of overnight stays}} \times \text{Total number of overnight stays}$$

Interpretation keys: The pressure from tourism measured as the amount of water used by tourists. If the amount of water used is increasing the demand for treatment of the water is increasing. The amount of water used by tourists during seasons causes an extra pressure of the treatment capacity.

Sources: Directive 98/83/EG. New Cronos Database, Eurostat. Regional environment. Total gross abstraction of total fresh water (ground + surface) by public water supply. Regional and/or local data can be used when available.

Time coverage: 1980, 1985, 1989-2000

Future indicator development: A somewhat better calculation may be attained if the residential population is assumed to spend part of the year outside the area, e.g. for their own recreation on other holiday resorts.
This indicator can be a key measure of physical carrying capacity for water-poor destinations and can also provide warning of potential limits or stresses on the supply system. (WTO)

Comments:

Tool: ETIS Toolkit

The European Tourism Indicator System for sustainable destination management
43 core indicators: destination management, economic value, socio-cultural impact, environmental impact

Section D: Environmental impact		
Criteria	Indicator reference#	ETIS core indicators
D.1 Reducing transport impact	D.1.1	Percentage of tourists and same-day visitors using different modes of transport to arrive at the destination
	D.1.2	Percentage of tourists and same-day visitors using local/soft mobility/public transport services to get around the destination
	D.1.3	Average travel (km) by tourists and same-day visitors from home to the destination
	D.1.4	Average carbon footprint of tourists and same-day visitors travelling from home to the destination
D.2 Climate change	D.2.1	Percentage of tourism enterprises involved in climate change mitigation schemes — such as: CO ₂ offset, low energy systems, etc.— and ‘adaptation’ responses and actions
	D.2.2	Percentage of tourism accommodation and attraction infrastructure located in ‘vulnerable zones’
D.3 Solid waste management	D.3.1	Waste production per tourist night compared to general population waste production per person (kg)
	D.3.2	Percentage of tourism enterprises separating different types of waste
	D.3.3	Percentage of total waste recycled per tourist compared to total waste recycled per resident per year
D.4 Sewage treatment	D.4.1	Percentage of sewage from the destination treated to at least secondary level prior to discharge
D.5 Water management	D.5.1	Water consumption per tourist night compared to general population water consumption per resident night
	D.5.2	Percentage of tourism enterprises taking actions to reduce water consumption
	D.5.3	Percentage of tourism enterprises using recycled water
		Energy consumption per tourist night compared to general population energy



Case Study Vienna

Visitor Economy Strategy 2025 was developed in a broad-based stakeholder dialog.

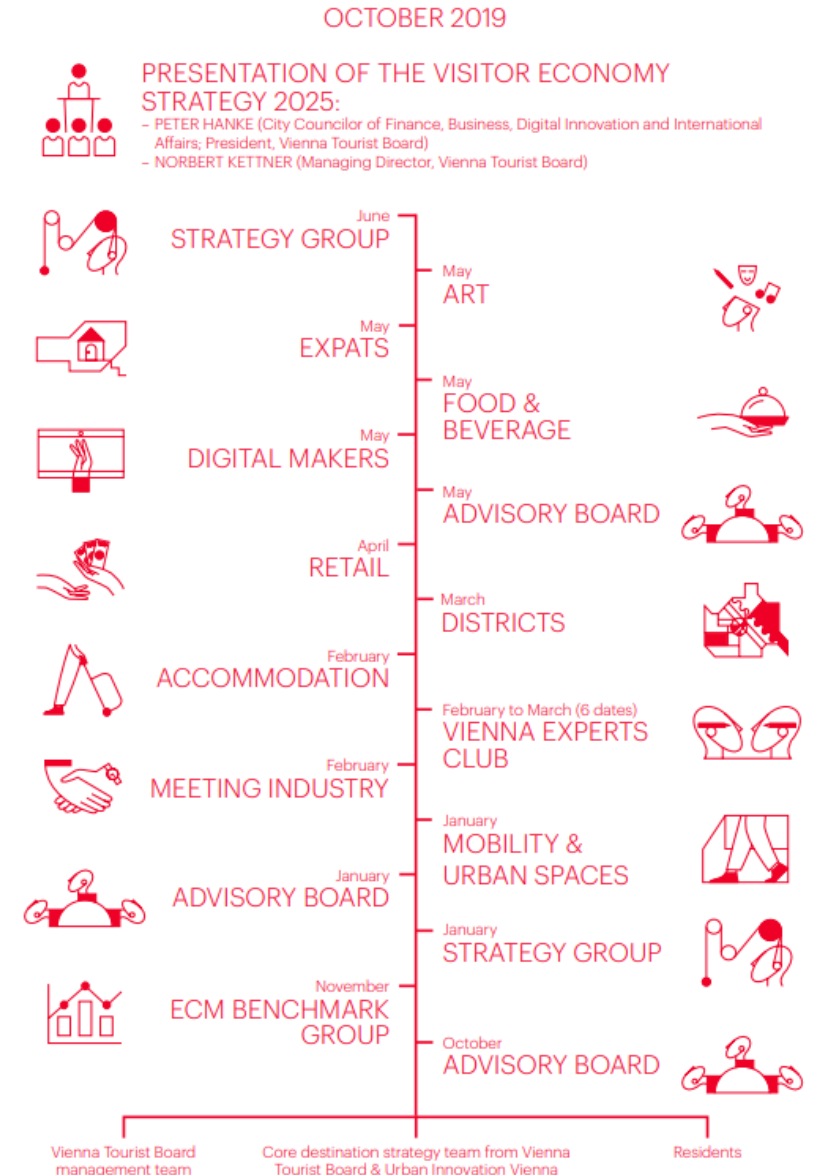
VTB engages with industry stakeholders as well as visitors and residents, collecting feedback on a regular basis and implementing ideas.

Formats for stakeholder engagement:

- DISCUSSION FORUMS to facilitate dialog between experts from various areas but also open to anyone.
- SHAPING.VIENNA.INFO website, curated by the Vienna Tourist Board, central destination management communication platform to inform stakeholders and get their suggestions.
- SURVEYS of visitors and Viennese residents.
- Key customer touch points are specifically analyzed to continuously improve offerings and services.

Strategic process

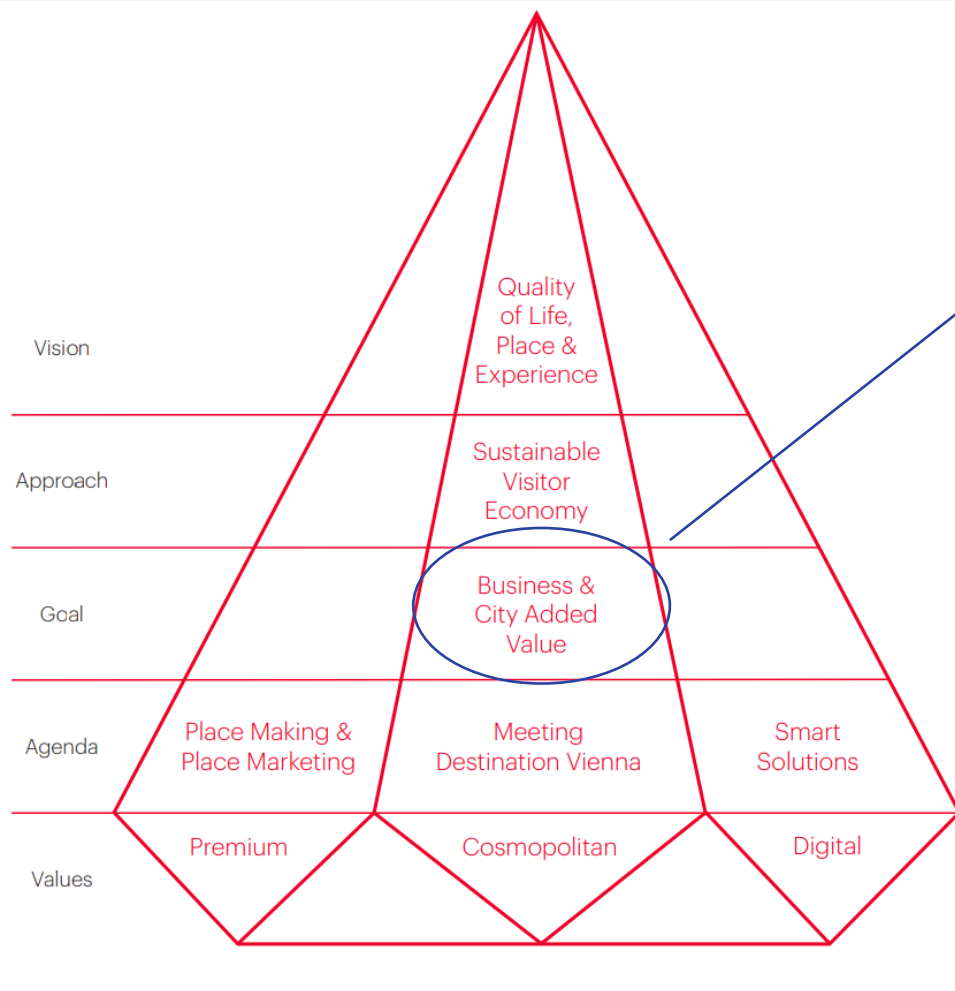
VISITOR ECONOMY STRATEGY 2025



OCTOBER 2018

Case Study Vienna

Viennese Strategy Diamond



From strategy to 6 Key Performance indicators



Q&A

To ask questions, please click on the button in the bottom right corner of your screen.

● Ask a question

Write your question.
Then write your name to send it off.

10 minutes
12:15 – 12:25



Next steps



Pillar 2 webinar: Data management and technological solutions

Get inspired and pick up new tools: innovative technologies and smart solutions for tourism

17/11/2022

11:30 – 12:30



Pillar 3 webinar: Human Capital and Skills

The future of work: new skills and profiles for Smart Tourism and how to get ready

20/01/2023

11:30 – 12:30



Pillar 4 webinar: Knowledge transfer

Opportunities and tools for data and knowledge sharing: latest trends and possible solutions in Smart Tourism

10/02/2023

11:30 – 12:30



Pillar 5 webinar: Ecosystem management

Data and tourism ecosystems: from mapping to managing

11/04/2023

11:30 – 12:30

Link to the webinars: <https://smarttourismdestinations.eu/webinars/>



Pillar 1 & 2 workshop *Only for selected Tourism Destinations!*

Develop your strategy and prioritise specific data-driven actions for your Smart Tourism Destination.

13/12/2022

09:30 – 12:15



Backup slides

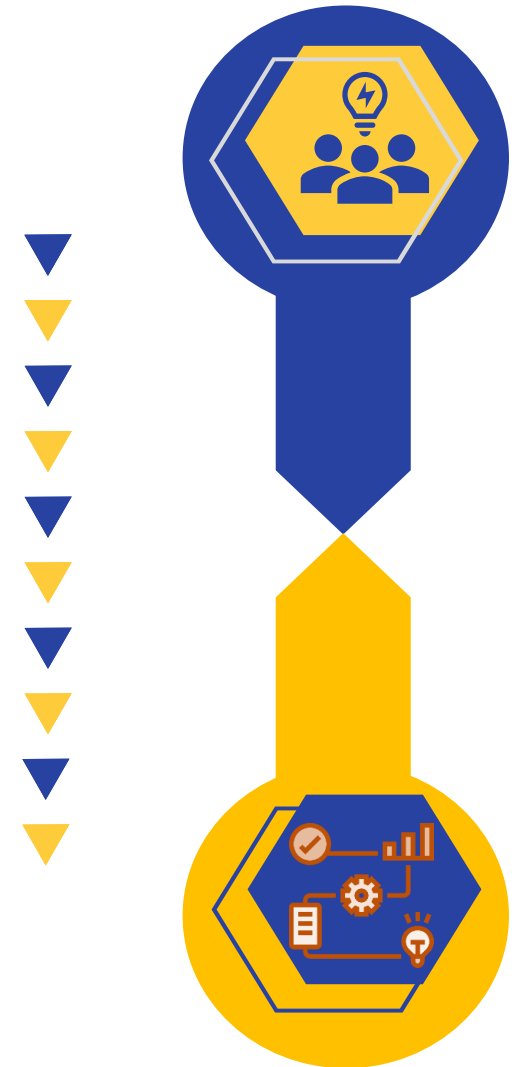
Smart marketing example

Basic tourism descriptors

Contain data and statistics to characterize the tourism activity of a destination (e.g., tourism supply, tourism demand, tourism offer)

For ex.:

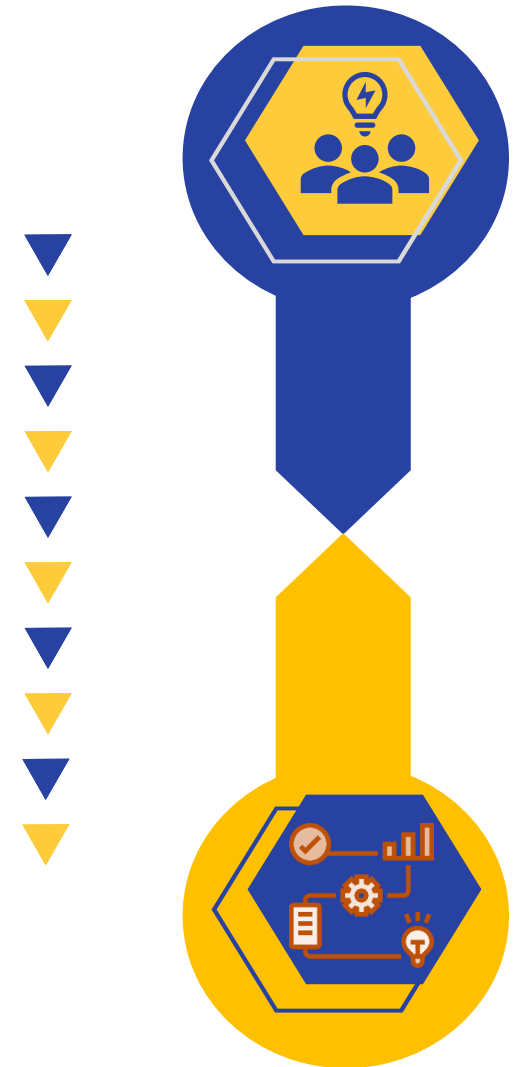
- Number of tourist arrivals/overnights
- Occupancy rate
- Average duration of stay
- Share of country of origin



Smart management example

Environmental Impact Indicators (Examples)

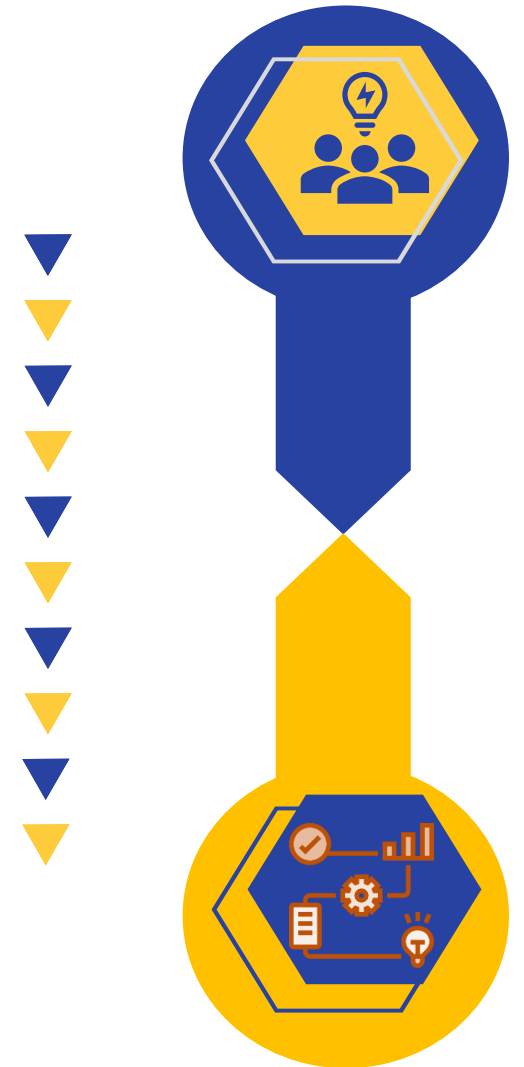
- **Tourism GHG intensity:** Amount of greenhouse gas (GHG) emissions produced by the tourism ecosystem per Million Euro of Gross Value Added (GVA) in the tourism sector
- **Tourism energy intensity:** Amount of energy used in tourism-related economic activities per Million Euro of Gross Value Added (GVA) in the tourism sector
- **Share of trips by train:** Relative importance of sustainable means of transportation within a tourism destination.
- **Excellent bathing water:** Quality of bathing waters.
- **Dependence on distance origins (%):** Dependence of a country's tourism on distant international markets.



Smart management example

Digitalisation Indicators (Examples)

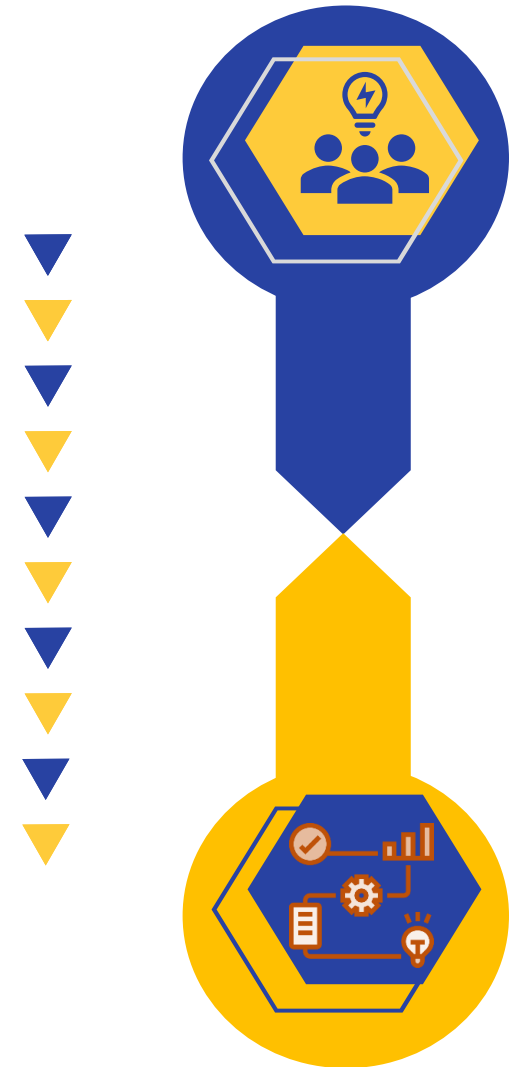
- **E-commerce sales:** Percentage of tourism ecosystem enterprises with online sales.
- **Enterprises using social media:** Share of tourism ecosystem enterprises using two or more social media
- **Personnel training on digital skills:** Share of tourism ecosystem enterprises providing ICT training to their personnel.
- **Internet speed at tourist destination:** Maximum available speed of internet connection at tourism destinations.



Smart management example

Socio-economic vulnerability Indicators (Examples)

- **Tourism intensity:** Number of nights spent at tourist accommodations by the resident population.
- **Tourism seasonality:** Temporal concentration of tourism activity throughout the year.
- **Dependence on Top 3 countries of origin:** Share of the nights spent from the top three countries of origin in relation to the total nights spent.
- **Contribution of tourism to employment:** Estimate of the total contribution of the tourism activity to employment.
- **Average tourism expenditure:** Average economic value generated per night spent at the tourist destination.



Smart stewardship example

Governance and Community Well-being Indicators (Examples)

- Implementation of a strategic tourism plan
- Coordination mechanisms between local administration departments for the smart destination project development
- Implementation of a smart destination project
- Existence of a smart destination coordinator (responsible technician)
- Mechanisms to facilitate public-private partnership
- Development of E-Government/open government strategies
- Development of social awareness campaigns on tourism impacts among citizens
- Quality of experience for guests (e.g., visitor recommendation rate)
- Quality of life for residents

