D 2.1 – Overall strategic recommendations related to digitalization of the tourism sector
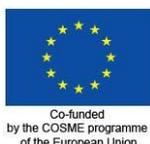
DIGITOUR - Boosting the tourism sector in Europe through digital toolsand innovation

Action number: 101038133

COORDINATOR:

VENETIAN CLUSTER

RESPONSIBLE OF THE DELIVERABLE:
Consulting Cluster Veritas

Project deliverable

Project number	101038133	Project title	DIGITOUR
Programme	COSME	Thematic priority	Tourism SMEs and Digitalisation
Start of the project	10th November2021	Duration	26 months

Deliverable title	D2.1 Overall strategic recommendations related to digitalisation of the tourism sector

Contractual delivery date	09/02/2022	Actual delivery date	25/05/2022
Dissemination level	Public		
Responsible of the deliverable, contributors	Consulting Cluster Veritas, all partners		

Abstract of the deliverable	**Understanding the regional tourism contexts** summarizes the efforts of project partners for researching and comprehending the current situation, the strategic needs and future strategies and plans related to existing digital tools. It aims at recognizing present and future innovation to boost the tourism sector. Each partner examined and analysed strategic documents related to the tourism sector and its development in the respective country/region. Information about this strategic development was collected by contacting relevant public bodies and/or Destination Management Organizations. Information was gathered about their vision in relation to existing digital tools and innovations to boost the tourism sector. These data were compared and analysed, and recommendations were drawn. These recommendations aim to support the consortium in the definition of WP3 Call for Proposals. The activity described in this deliverable was considered by the partners as an opportunity to actively involve public actors and stakeholders in the project, as they will then be invited to attend and contribute to WP3 information and inspiration events and will be again involved in networking and public private partnerships based on the innovative processes started by the project SMEs as a result of project WP3 activities. It was also considered as a good chance to disseminate information about the project locally.

Revision history			
Version	*Date*	*Description*	*Author (organisation)*
V1	25.05.2022	D2.1 Overall strategic recommendations related to digitalisation of the tourism sector	Teodora Jilkova (VERITAS)

Content

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Contents and annexes

1 Introduction

The deliverable D2.1 "**Overall strategic recommendations related to digitalisation of the tourism sector"** (D.2.1.1.1 Understanding the tourism context) comes as a result from the activities in WP 2 – Collection of **User Needs and Requirements of SMEs in the tourism sector** and the elaboration of an overall transnational definition of such needs and requirements, and to provide a basis for the project's Call for proposals criteria for tourism SMEs. It is a part of the WP2 together with the **Mapping of players, experts, and best practices of digital solutions and technologies** at country and European level that could be relevant for the tourism sector and support the aim to innovate and increase sustainability.

This deliverable precedes the **Mapping of training and capacity building opportunities** that are relevant for the project as a resource for SMEs, especially for the first voucher scheme on up-skilling and capacity building. It will serve as a base for **Launching a Call for Expression of Interest for suppliers of digital tools, technologies, training, and advisory support** to provide a repository to facilitate partner search and cross-sectoral matchmaking during WP3 activities.

The deliverable is a part of preparatory activities which allow for a more precise Call definition for WP3 vouchers. In this way the consortium guarantees that the financial support from the Call is directed to the real needs of the SMEs after thorough consideration of the regional context, and with regard to skilling and innovative solutions and offers concrete training possibilities and partners to the tourism SMEs. The activities for elaborating this deliverable were undertaken under the coordination of Consulting Cluster Veritas.

The document is prepared in PDF format and contains 21 pages in total.
It embeds an overview with concise information from each country about the significance of the tourism sector and the tourism SMEs for the GDP of the respective region/country and the negative consequences brought by the COVID pandemic on it. As a second part comes the description and understanding of the tourism ecosystem with different kinds of stakeholders and their link to SMEs as a target group.
On the third place, local policies, programs, initiatives and statements about the digitization of the tourism sector are described and analyzed - as effectiveness and feasibility.
In the end part recommendations and conclusions are summarized and provided.
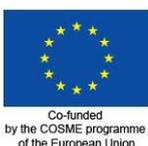
2 Deliverable summary

2.1 Deliverable abstract

Understanding the regional tourism contexts summarizes the efforts of project partners in focusing their activities on the current situation, the strategic needs and future strategies and plans related to existing digital tools and present and future innovation to boost the tourism sector. Each partner conducted a thorough research and analysis of strategic documents related to the tourism sector and its development in the respective country/region. Information about this strategic development was collected by contacting relevant public bodies and/or Destination Management Organizations. Information was gathered about their vision in relation to existing digital tools and innovations to boost the tourism sector. These data were compared and analysed, and recommendations were drawn. These recommendations aim to support the consortium in the definition of WP3 Call for Proposals. The activity described in this deliverable was considered by the partners as an opportunity to actively involve public actors and stakeholders in the project, as they will then be invited to attend and contribute to WP3 information and inspiration events and will be again involved in networking and public private partnerships based on the innovative processes started by the project SMEs as a result of project WP3 activities. It was also considered as a good chance to disseminate information about the project locally. During the inspirational events in WP3, the recommendations of A.2.1 activity will be presented to SMEs.

2.2 Deliverable objectives

The objective of D2.1 is:
- to focus attention of project partners to the current situation in each country/region in question, the strategic needs and future strategies and plans.
- to deploy understanding of the real situation and the new challenges of the tourism sector and boost innovative ideas to improve the tourism offer by SMEs in terms of both products and services, and foster competitiveness and sustainability.
- to lay down the ground for the WP3 activities.

By achieving the objective, partners will define more precisely:
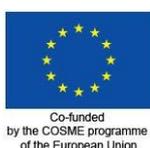- the Call for WP3 vouchers,
- outline effective and well targeted communication activities.

3 Scope, use and impacts of the deliverable

3.1 Scope of the deliverable

In the overview all partners stated that for their countries/regions in recent decades, tourism has been one of the strongest and most rapidly developing and promising sectors of the economy.

Data for recent years up to the pre-pandemic 2019 show an unprecedented increase in both travel, revenue, tourism, and jobs.

The countries of the consortium are no exception to the global trends.

All partners declared that the COVID-19 pandemic seriously affected the tourism industry. In terms of contribution to GDP, tourist arrivals and tourism jobs the result was a huge decrease:

- In Italy – decrease in arrivals with minus 67% in 2020 and 48% in 2021 and jobs with minus 60% in 2020 and 37% in 2021.
- In Spain/Aragon Region – minus 116402 millions of arrivals and 841000 tourism jobs less in 2020 compared to 2019
- In Germany/Bavaria – a drop of almost 50% in arrivals ad 66.3 %in overnight stays compared to 2019
- In Czech Republic – the share of tourism in GDP fell with 50% compared to 2019
- Denmark recorded a decrease of tourist arrivals of 30% compared to 2019
- In the other countries of the consortium a decrease between 55% (Bulgaria) and 25 % (Serbia) has been recorded.

When mapping the local tourism ecosystems all countries explained their efforts in presenting the DIGITOUR project at local, regional, national and even international level.

In Italy seven main actors have been identified (sectoral associations, media, NGOs, DMOs). In particular, concrete interviews have been organised with at least 5 entities. All these stakeholders have shown deep interest towards the DIGITOUR project, which will concretely and positively impact the Veneto region and beyond. Thus, the general perception has been positive and optimistic, providing significant insights and inputs, relevant articles on regional media and good media coverage.

In Spain partners TSAC/IDIA have contacted more than 20 SMEs and one interviews to understand their needs. TSAC has participated in the definition of ARAGONESE TOURISM STRATEGY PLAN (PAET 2016-2020) and STRATEGY ARAGON TOURISM SUSTAINABLE -2030, giving us a good knowledge of the Aragonese local tourism ecosystem.

In Germany/Bayern several institutions are involved in the development the tourism sector:
- DTV - Deutscher Tourismus Verband: Since 1902, DTV has been committed to the successful development of tourism in Germany. It represents the interests of municipal, regional and state-wide tourism organisations and promotes forward-looking quality tourism in Destination Germany.
- DZT - Deutsche Zentrale für Tourismus: The German National Tourist Board represents Germany as a travel destination abroad and works on behalf of the Federal Ministry for Economic Affairs and Energy. It is responsible for Germany's positive image and image promotion in a total of 32 foreign representations.
- DRV - Deutscher Reiseverband: The German Travel Association (DRV) reflects the structure of travel distribution and the tour operator market in Germany. Here the interests of the members are represented at the political level and at home and abroad. DRV Service GmbH is responsible for the economic business operations.

- DEHOGA - Deutscher Hotel- und Gaststättenverband: The German Hotel and Restaurant Association is the industry association of the German hotel and restaurant industry and acts as the representative of the members' interests. DEHOGA is responsible for hotel classification.
- DHV - Deutscher Heilbäderverband: German Spas Association: The German Spas Association presents members in the field of spas and baths as well as in the field of health and wellness tourism in Germany
- Bundesverband der Deutschen Tourismuswirtschaft: As the umbrella organisation of the German tourism industry, the Federal Association of the German Tourism Industry promotes the common, overarching interests and needs of the industry. The spectrum of members ranges from air, road and rail transport to the hotel and catering industry, tour operators and congress centres, to tourism marketing.

All of the above oraganisations, have been contacted by ITALCAM. ITALCAM has presented the DIGITOUR project at local and regional level. Concrete interviews have been organised with companies, more specifically SMEs operating in the tourism industry.
Despite showing a deep level of interest towards the DIGITOUR project, as well as for the opportunities it will provide to the tourism digitalization domain, several stakeholders aroused doubts relating to their participation in the project.

In France/Nouvelle Aquitaine, in order to understand the tourism policy deployed today, it is important to identify the French public tourism organisations:

- *Ministère* - pilots the major actions for the revival of the sector and ensures its good economic health. It is supported by complementary institutions such as:
  - *Atout France* promotes France as a destination abroad
  - *Business France* assists companies in their export projects and setting up abroad.
  - *The fédération nationale des offices de tourisme et syndicats d'initiative* represents local tourist organisations throughout France.
  - *The Direction Générale des Entreprises* runs and coordinates a unique network in the world, France Tourisme Lab – a national network of tourism incubators and accelerators and promotes initiatives to reinforce the visibility of innovative tourism companies in France and in the world.
- *"Les Comités Régionaux du Tourisme"* in each region is financed by the regional councils, they have a mission of tourism development at the regional level with a preponderant role in the promotion of the region on foreign markets.
- "*Les Comités Départementaux du Tourisme*": (Departmental Tourism Committees) coordinate all tourism structuring operations at departmental level in conjunction with the regional council with a communication/promotion /marketing prism. The CDTs implement the departmental tourism plan defined by the departmental assembly. The CDTs can provide support to local organizations, tourist offices, etc.
- *"Les offices de tourisme et syndicats d'initiative"* (Tourism boards) are local tourist structures linked to the Tourism Code. These institutions carry out public service missions and are classified by the state. They represent a territory and ensure the reception of tourists, the distribution of information, the promotion of its destination, the coordination of tourist service providers.

In **Denmark/Central Jutland** Region, the Aarhus University has already been in contact with the relevant SMEs and large tourism agencies informing and presenting the DIGITOUR project. Phone interviews have been organised within the last few months. All the relevant stakeholders have shown great interest in the project, and its aims, and one of their most relevant questions was how they could be benefited from DIGITOUR. In most of the cases, it was discussed with them that they could participate in the project in various ways, for instance by participating in the info days or by taking part in the up-skilling and capacity building competition for the voucher, which is targeting SMEs in order to increase their digital skills hoping to eventually positively impact the whole region.

In the **Czech Republic,** BizGarden Team contacted the relevant tourism stakeholders and informed them about the projects and benefits to their members if participating in the project activities. All the partners expressed their readiness to support the project through promotion of DIGITOUR activities and forwarding the information about the projects activities to their members where applicable.

Here, the Ministry of Regional Development is the founder of the CzechTourism agency, which goal is to ensure promotion of the Czech Republic and systematically develop activities leading to creating the image of the Czech Republic as a tourist destination both abroad and on the domestic market. With its activities, the agency contributes to overall development of tourism, in collaboration with representatives of state and local administration, organizations of destination management, industry associations and business and academic sectors. BizGarden used its contacts to key personnel of CzechTourism and did introduce the DIGITOUR project to them. BizGarden is also working with the Czech Tourism Union. It is the largest independent professional association for the coordination and presentation of the interests of entrepreneurs in the tourism industry, both internally and externally.

On regional level tourism development and the promotion of the destination is in the hands of regional authorities and tourism centres established by them.

The management and financing of tourism is mainly in the hands of the political representation and officials of state and local governments. Unfortunately, this situation is not conducive to the development of tourism; effective management should rather be in the hands of the real stakeholders in the sector, local businesses, entrepreneurs and professional associations.

A promise of change is the draft Tourism Act currently being drawn up, which should completely change the way in which destinations are financed and how decisions are made about their development. The draft and the first version of the law are expected before the end of this year.

In **Serbia**, the Cluster of Cultural Routes has already been in contact with the relevant with relevant ministries, chambers of commerce, regional agencies, SMEs and media, informing and presenting the DIGITOUR project. Phone and online interviews have been organised within the last few months. All the relevant stakeholders have shown great interest in the project, and its aims, and one of their most relevant questions was how they could be benefited from DIGITOUR. In most of the cases, it was discussed with them that they could participate in the project in various ways, for instance by participating in the info days or by taking part in the up-skilling and capacity building competition for the voucher, targeting SMEs to increase their

digital skills further aiming to eventually positively impact the whole region. More than 20 small and medium enterprises from Serbia, Croatia and Montenegro filled out the survey and showed great interest in applying for vouchers.

In **Bulgaria** 28 SMEs filled in the questionnaire, which represents the highest interest among SMEs for the whole consortium. Despite the many opportunities that digitalisation and innovation offer, Bulgarian tourism companies' experience is limited to the performance of their own web site, inclusion on some of the global booking platforms such as Booking.com or for evaluation like Tripadvisor, and the collection of information about the preferences and wishes of the regular customers.

In the table below all contacted stakeholders are presented per type of organisation (Public Institutions, Media, NGO, Cluster etc.)
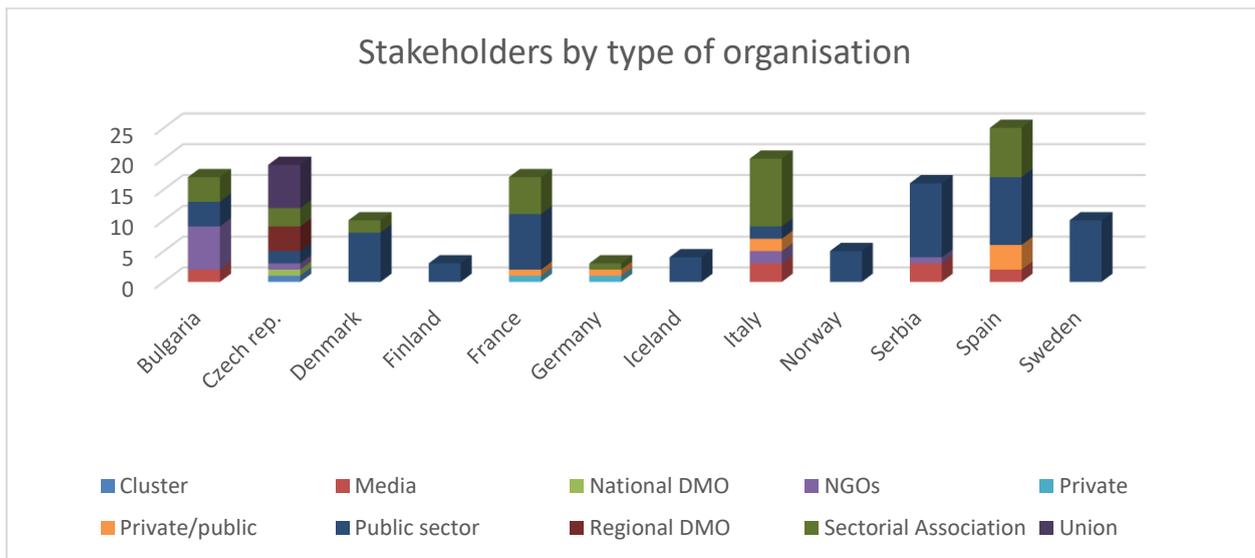

Table 1

One of the most important achievements of the research is the confirmation of the partners to ensure a direct link to SMEs. In the table below an idea for the direct link to tourism SMEs based on the mapping efforts is presented by country. In all countries, shares are calculated on the basis of all addressed stakeholders:
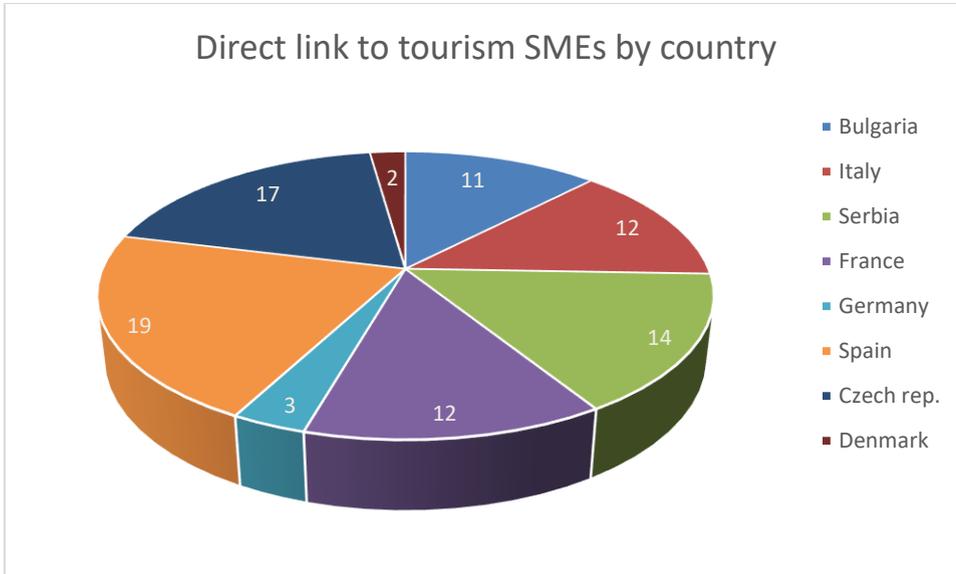
Table 2

All countries/regions mention recovery in arrivals and jobs in 2022 (so far) compared to 2021.

In all countries, in the post COVID era even more, the partners stressed that they are witnessing tourist demand of a new type that, by its scale, tendencies and essence, which is the result of the growing demandingness of customers and the entry of new competitors with innovative models of work. The new market conditions provide development only to those destinations and even individual organizations that are flexible to the changing environment and able to anticipate the wishes of their customers. All partners state the need to exploit the considerable potential of tourism for business, employment and regional development.

There is explicit need to improve coordination between ministries, local governments and professional organizations related to tourism. Statistical information on the nature, development and consequences of tourism is so far based mainly on statistics on tourist arrivals (including non-commercial tourism) , overnight stays and balance of payment information such as foreign tourism receipts and expenditure (CZ, BG and Serbia). Digitalization will ensure restart of the whole sector in the COVID aftermath.

The mapping of the local tourism ecosystem in all countries/regions shows that the tourism development is a responsibility of the relevant Ministries and laws on a national (CZ, BG, SR) or provincial/regional level (Italy/Veneto, Friuli Venezia Giulia and Lombardia, Germany/Bavaria, Spain/Aragon Region, DK/Central Jutland Region).

In all countries/regions regional and National tourism development programs and plans are in place. Some of the partners have even participated in the elaboration of such strategies (TSAC, Spain).

All countries have developed initiatives and ensured support to the tourism sector as one of the most affected by the COVID-19 pandemic.

In **Italy**, the new 2021-2027 programming period will largely concentrate on the promotion and encouragement of sustainable tourism (Deliberazione Regionale n.16/ 2022). The objectives of the program will concern the creation of organization models and integrated management of destinations, through the development of devoted tools for tourism governance and through the enhancement of local production chains to be connected with slow & green tourism products (cycling, hiking, hippo tourism, river tourism, etc..), in an open-air tourism context. Moreover, digitalisation for tourism SMEs is a crucial element in Veneto. Indeed, a specific event dedicated to digitalization and tourism sector (Digital Tourism 2021 https://digitaltourism.it/) has been planned and organized in 2021 and will be replicated in 2022. In 2020, the Veneto region launched specific calls for the digitalization of tourism SMEs, receiving devoted vouchers.

With reference to the interventions, the direction of reference will favour both through investment funds, regional and European contributions (INTERREG) support for events and tourism projects, tourism infrastructure, on tourism professions, in favour of accommodation facilities and through European funding. It has already launched several calls to support regional tourism.

In Germany, in order to soften the resulting burdens and to enable a powerful new start, the Bavarian government launched the support program "Tourism in Bavaria - fit for the future". It was considered important to initiate investments, especially in the areas of sustainability, future viability, visitor flow management and digitalisation, as well as e-charging points. This special program therefore allows for reaching impactful goals ensuring Bavaria the possibility to keep its role as pioneer and trendsetter in the tourism industry in the long term. With this program, Bavaria shall have the opportunity to use the crisis as a chance to achieve a considerable increase in the quality of tourism offers and services in Bavaria - especially among the small and smallest providers - and to establish itself even more strongly as a sustainable holiday destination.

The state government made budget funds of 30 million euros available for the special programme "Tourism in Bavaria - fit for the future" to lay the ground for a powerful and rapid boost through a variety of new funding opportunities.

A range of tourism focused programs have been put in place to support and boost the sector, among others the "Bayern Digitales Dorf" (Bavaria Digital Village) and Bavaria Cloud.

The "Bavaria Digital Village" aims to develop and implement digital strategies that strengthen tourism in Bavaria as a whole and enable tourism stakeholders to offer guests an even better travel experience in the region. Bavaria Cloud is intended as a data hub, for allowing simple data exchange for different stakeholders in the future and to provide all relevant tourism information in Bavaria in an up-to-date and centralised manner for further use.

To better exploit the opportunities of digitalisation in the tourism industry, the Bavaria Cloud in Tourism project has set itself the goal of establishing an open digital data infrastructure as the basis for innovations and new business models in tourism, piloting the project in the region of Allgau.
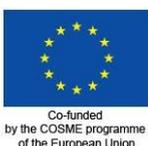
In France, **INNOVATION** is the keyword for the entirety of solutions that can be submitted to deeply change tourism in Nouvelle-Aquitaine and beyond. The conciliation between high-technology and environment is therefore also a paramount challenge. Digital tools, as connected objects (internet of things), innovative communication and information devices as well as artificial intelligence shall be considered as ideal tools to fundamentally change the current approaches for tourism. Generating new business opportunities and novel business models as well as new employment, especially for the youth, naturally pass by the **innovation capacity building** and "**up-skilling**" of the local stakeholders and their ecosystem. In the context of all these above-mentioned digital tools, it has not to be forgotten that the latter have also an impact on the environment. That is why "**digital sobriety**" is also something that SMEs must be made aware of. A **responsible and pertinent digitalisation process** can only be engaged if the SMEs' needs have been seriously assessed before. This avoids time and money loss and prevents superfluous and outdated solutions that have a negative impact on the environment.

The Nouvelle-Aquitaine Region has released emergency funds to support the tourism sector. It has mobilized an emergency fund of 73 million euros to support businesses in the most affected sectors. Aimed at associations and businesses in closed or highly affected sectors, this mechanism is intended to supplement the national solidarity fund for small businesses and associations suffering losses that exceed the compensation ceilings.

The Nouvelle-Aquitaine Region, together with regional tourism players, has set up a new tool to help revive the tourism sector – Tourism Labs. They support the economic rebound of the tourism sector and its repositioning, as well as its transition towards sustainable tourism.

In 2022, complementary measures in tourism supported by the Region have been announced, such as the Call for Innovative Tourism Experiments.

In **Spain/ Aragon Region**, the General Directorate of Tourism of the Government of Aragon developed a Sustainable Tourism Strategy and a plan with a 2030 horizon. It aims at facing the challenges of the tourism sector in the medium and long term, and at the same time promoting the pillars of sustainability: socioeconomic and environmental.

Many initiatives for supporting the tourism sector have been implemented here:

- Aid for digital transformation and innovation in the tourism sector due to economic damage arising from COVID-19
- Order ICT/1524/2021, of December 30, which establishes the regulatory bases for aid for the "Spain Tourism Experiences" Program
- Support for companies and freelancers in the tourism sector
- Expansion of the "Thomas Cook" line of financing for the tourism sector.
- Tourism Sustainability Plans in Destinations
- Grants from the Spanish tourism experiences program

In Czech Republic there is a very limited support specifically targeting the SME's in the travel industry. Organisations in the sector are often excluded from the opportunity to submit proposals in the national programs. First, but very limited opportunities do open within of The National Recovery Plan where one of the pillars is the Digital Transformation. Most of the funds will be targeted to the institutional applicants and a small part of the available budget could be used by SME's. The digital economy is a huge opportunity for the development of the Czech economy. Rapid digitalisation is a source of global competitive advantage, while lagging European and world

leaders in this area will quickly become a competitive disadvantage. It is therefore necessary to create and develop a fully functional and sustainable digital ecosystem to support the introduction of new and emerging technologies into the economy. With such aim increasing the competitiveness of companies and making life easier for citizens will reduce costs for the state. The National Recovery Plan will support digital services to citizens and businesses in the public administration, high-speed internet, innovative start-ups and businesses using modern technologies or support the acceleration of construction management through digitalisation.

In Denmark, tourism policies are directed by the Ministry of Industry, Business and Financial Affairs, however, decision-making is mainly happening decentralised, in local communities. There is a general guideline and coordination by the Ministry regarding tourism policies – and VisitDenmark as Destination Management Organisation manages the international marketing and branding of the country – nevertheless, the approach is far from the "one-size-fits-all". There are regions with many visitors, such as Zealand and specific, Copenhagen and others such as the west part of the country that do not base their economy on the arrivals. There is sufficient decisional freedom for local communities to prioritize or not whether their activities are in alignment with the strategic growth plans of the local community. On this basis, since 2020 there have been established 15-25 local destination management organisations (DMOs) that have resulted in a more efficient system administering tourism. The DMOs in parallel to the national strategy for tourism (announced the development in 2019) prioritised the digitalisation of the sector setting specific goals by 2025. These were:

- Grow visitation by a third compared to 2015. This in short means 17 million more bed-nights
- Grow tourism spending to DKK 140 billion. The amount in 2014 was at approx. at DKK 90-95 billion, and last
- Increase visitor satisfaction scores which a decade ago were lower compared to the rest of Scandinavian countries (OECD, 2020)

What should be stressed is that Denmark and Danish tourism authorities do not operate as in a traditional summer or winter destination country. As mentioned already, the focus is given to alternative tourism paths. According to a VisitDenmark analysis, in 2018 non-commercial tourism contributed 40% and 53.6 billion DKK to the total yearly tourism-related profits (VisitDenmark, 2021).

In **Serbia**, the Tourism Development Strategy of the Republic of Serbia (2016-2025) stes as a main goal to raise the attractiveness of tourist products and build the competitiveness of destinations through investments in tourist infrastructure, tourist valorisation of cultural assets, promotion, and improvement of tourist offers.

Although digitalisation is barely mentioned in this strategy, the Ministry of Trade, Tourism and Telecommunications of Serbia last year identified digitalisation as one of the key activities for improving the quality and accessibility of tourist services. Through the project "Digitalisation of
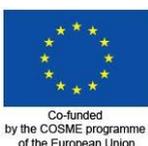
the tourist offer of Serbia" (2021-2023), the Ministry plans to establish a national digital tourist guide, which will bring together information on important sites, events, routes and tourist regions. The goal is to facilitate the registration, categorisation and business of tourism service providers, and to provide guests with a guarantee of service quality. The digital platform e-Turista (http://www.eturista.gov.rs/) has already been launched, as a central information system in tourism and catering, which will enable advanced searches and the possibility of direct reservation of accommodation (it is believed that this will contribute to the reduction of the grey economy). Its main goal is, on the one hand, to enable tourists to get information quickly and make a decision about travel, and on the other hand to enable an easier electronic process of registration and categorisation of tourist facilities. Use of the platform is free.

In **Bulgaria**, there were eight calls for tourism entrepreneurs since mid-2021, being developed as a State aid scheme in the form of grants for tourism sector businesses experiencing liquidity difficulties due to COVID -19. The aid was administered by the Ministry of Tourism. The country has a National strategy for sustainable tourism with a horizon 2030. It is formulated back in 2014 г. Since 2015 and until the COVID-19 pandemic, the country has reviewed the EU's and national tourism priorities in the context of policy strategies more generally, but without formulating an action plan to support their implementation. Furthermore, the strategy has not indicated how it should use available EU funding to achieve these priorities. Bulgaria must set a tourism agenda for 2030, translated into a post-COVID strategy and action plan with medium- and long-term objectives and effective mechanisms for governance and adequate resources.

3.2   Use of the deliverable

Each partner will be able to **understand** the grounds and create priorities to **establish** valuable connection to **reach the target groups** through their networks.

The deliverable will favour and support Inspirational Events and Communication & Dissemination strategy – it will help to promote cross-sectoral partnerships both at territorial and cross border level, on one hand - among tourism sector SMEs and the tourism ecosystem, and on the other hand - between the tourism and the digital ecosystems, reaching as many as possible layers of the tourism ecosystem and beyond.

Each partner will obtain and understand information for:

1. COVID effect on the tourism sector (more general), using official government reports/statements
2. Public vision in relation to digital tools and innovation to boost the tourism sector
3. Ongoing financial (and or intellectual) instruments, supporting the tourism recovery – this will be used for efficiency reasons, as to avoid duplication and repeated actions when adding value to those instruments with DIGI Tour activities. The deliverable will be used by the consortium also when considering the mapping of capacity building instruments in A.2.4.

4. How tourism is covered in the National plan for recovery & resilience.

All partners shared their readiness to support project visibility, which is presented in the table below. It represents the absolute number of participating stakeholders, ready to support project visibility. Only in Denmark none of the stakeholders has declared such readyness:
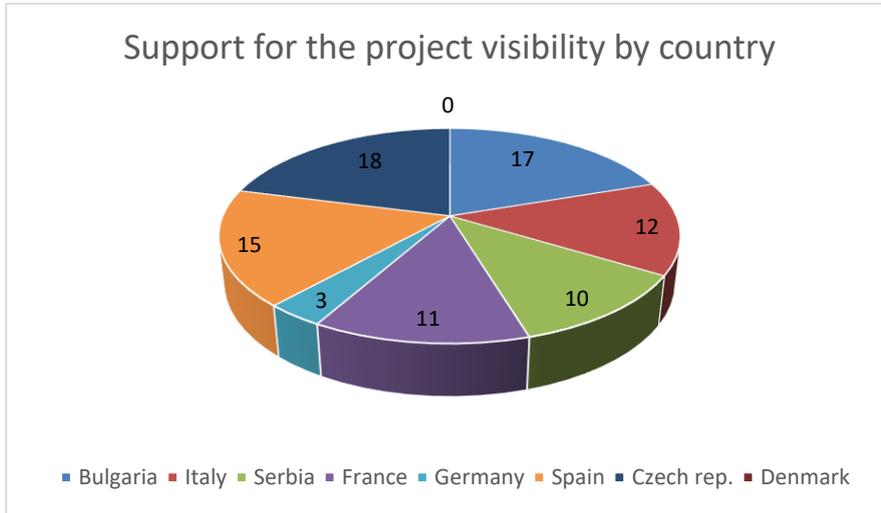

Table 3

3.3   Impacts of the deliverable

The expected impact of this deliverable can be summarized as follows:

It will help tailor the vouchers to the needs and requirements of tourism SMEs and bring them in line with tourism sector long term strategies at the EU and territorial level.

Recognizing the complexity and fragmentation of the tourism ecosystem and considering the need to increase resilience and competitiveness of tourism SMEs through digital tools and technologies both horizontally and vertically, it will help to **adopt different approaches to reach its objectives, considering the differences among SMEs but also the differences among the regional contexts**. DIGITOUR involves all participating countries, to give opportunities to tourism SMEs to increase their resilience and competitiveness and to liaise with their peers at the regional and international level, as well as with key players and networks. Therefore, based on this deliverable mainly, DIGITOUR will:

- Support tourism SMEs through **two types of tailor-made vouchers**, to respond to different needs of SMEs:

(1) an **Up-skilling and Capacity Building Voucher** for individual SMEs wishing to increase their skills and knowledge of digital tools and technologies to foster their competitiveness and scale-up AND

(2) the **Collaboration Innovation Voucher for groups of SMEs** wishing to cooperate on innovative projects at the national or transnational level (a more detailed description of the voucher scheme is provided under WP3).

Main target group benefitting from the project will be the SMEs.

In the future, based on the deliverable, partners will take advantage of it to foster networking at the European level by offering SMEs access to international collaboration platforms and networks (the Enterprise Europe Network, the European cluster collaboration platform, and specific regional and national networks dedicated to innovation in tourism).

Besides the 8 countries directly involved in the partnership, each partner is able to involve subjects from other countries thanks to existing international networks in which all partners are strong and well positioned. The Danish and Serbian partners have enlarged activities and included in the research also SMEs from Sweden, Norway, Montenegro.

4 Preparation and development of the deliverable

4.1 Preparation stages and deliverable development

Development steps

The preparation of this deliverable has undergone following stages:

1. In each country/ region, strategic documents and strategies related to the tourism sector and its development were collected, and relevant public bodies and/or Destination Management Organizations were contacted and interviewed to check on their vision in relation to digital tools and innovation to boost the tourism sector.
2. These data were compared and analyzed to draw recommendations that could support the consortium in the definition of WP3 Call for Proposals
3. Overall strategic recommendations have been suggested by all partners in the consortium and summarized by the Consulting Cluster Veritas, responsible for the deliverable.

Lessons learned

All partners demonstrated a huge commitment and have been in contact with tourism SMEs, large tourism players, public authorities, and all relevant stakeholders.
 By mapping the local tourism ecosystem in each country/region the partners concluded that the whole engagement process is a long-lasting endeavor. The challenge was that in some countries (Denmark /Central Jutland, Germany/Bavaria) SMEs did not want to participate since they do not want to devote time and probably because they were claiming that there will not be a clear benefit for them in the long-term. On top of that, the digitalisation of the sector in Denmark for example one way or another has been implemented based on available funding previously. The programme "Support for digital transformation in Danish SMEs" run just a year prior to this project was funded by EU's European Regional Development Fund and most tourism-oriented SMEs in the field did find support towards the direction of greening and digitizing their services (European Commission, 2021). Several other projects (Interreg, Horizon, and national projects) did support Danish companies again in the same direction, focusing on digitalization and

innovation for tourism SMEs in the recent past. In Germany, as part of the research, ITALCAM has contacted more than 200 people, published in different newsletters, and contacted acquaintances in the tourism department in Munich to try to reach the 20 companies, which was an indicator for each project partner. However, it was still very difficult to reach 10. A high number of companies required to fill in a survey and the form stated/claimed that the amount of time and work needed as well as the whole process to apply for Voucher 1 turns out to be quite a low sum for Germany (1000€). Likewise, for Voucher 2, companies believe it requires too much work to get in touch and arrange with other companies compared to the benefit they would receive thereof.

In Bulgaria, Serbia, Czech Republic, Italy and Spain the partners are convinced that they will exploit the considerable potential of the ICT and the digitalization of the sector is of utmost importance. The development and use of different digital technologies, together with various social changes, has generated important variations in communication between the different members of the tourism sector and through the ICT tourist offer can be substantially improved.

Main conclusions and recommendations:

-        Implementing and conceiving resilient solutions for tourism during the COVID-19 pandemic and beyond, including in rural areas;

-        Increasing regional investments in sustainable and open-air tourism and in innovation and digitalisation for tourism SMEs;

-        Enhancing the development and performance of the tourism industry to be fostered through deseasonalization, the diversification of the touristic demand and a better distribution of the touristic flows in the whole territory, towards a more sustainable growth, a "tailor-made" tourism and a more resilient perspective;

-        Developing and creating organization models and integrated procedures of destination management, through the development of devoted tools for tourism governance and the enhancement of local production chains to be connected with slow & green tourism elements, in an open-air tourism context;

-        Promoting the valorisation of touristic resources and of cultural, historical, artistic, territorial and environmental heritage.

- Improve mobile coverage and Internet connection in rural municipalities where needed, which hinders the digital transformation of the sector in the rural world and the tourist revitalization of these spaces through ICT.

- Big Tourism Data to gather customer´s experience through shared data banks. Transform the data into knowledge flows useful, ubiquitous, and multidirectional to all the human capital involved in the sector

- Allow the monitoring and assessment of the effects and impacts of tourism activity and the performance of evolutionary analyzes to detect trends in the sector that serve as predictive systems to anticipate scenarios and provide tourism managers with powerful tools to support making decisions that ensure tourism intelligence, resilience, sustainability and, ultimately, the competitiveness of the destination

- The intensive and intelligent use of an ecosystem of digital technologies is necessary to enhance communication —before, during and after the trip-. Some of the most relevant and disruptive technologies are:

- o Internet of things (IoT).
- o Augmented Reality (AR) and Virtual Reality (VR).
- o Artificial intelligence (AI) and robotization
- o Geolocation and TIG

- New plans needed to help countries and regions recover after COVID, focusing on four key points: growth, transition, sustainability and local value
- Elaborate plans for sustainable tourism development, including alternative tourism, digitalisation Includeing to strengthen cultural tourism
- Therefore, the main recommendation is to focus the activities of the DIGITOUR project in Serbia on digital innovations in creative industries in order to strengthen and promote heritage tourism and cultural tourism.

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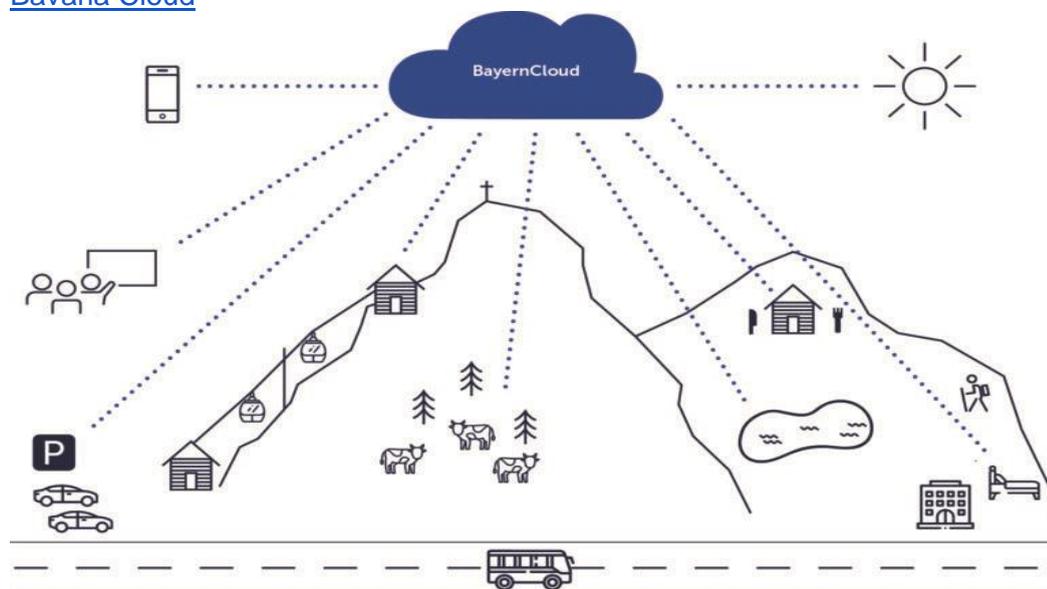
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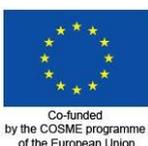
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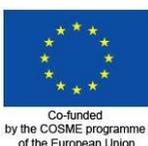
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