

The European Perspective:

The EU 2026 Sustainable Tourism Strategy

21st TourMIS Users' Workshop & International Seminar

Vienna– 11 September 2026

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A tourism strategy for tomorrow

Objectives

- reinforcing governance
- balancing sustainability and competitiveness
- integrating tourism across sectoral policies

Priority areas

1. Sustainable competitiveness
2. Sustainable connectivity
3. A resilient and future-proof sector
4. Global outreach



Consultations results (May – September 2025)

- Broad stakeholder alignment on the need to **tackle unbalanced tourism** and give destinations tools to manage today's challenges (becoming « smart/intelligent destinations »)
- Stakeholders aligned on the need to **close the skills gaps**
- Strong alignment on the need to **reduce administrative burden** for the sector
- Stakeholder support to **prioritise sustainability in the broad sense** (environmental, economic and social), including sustainable travel modes
- Connectivity: priority on **multimodal ticketing and high-speed rail**
- Digitalisation: accent on **data sharing and digital skills**
- **Shared branding** to maintain global lead complementing national/regional brands



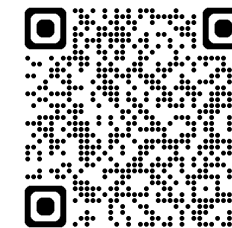
Towards a common EU vision for tourism

- the aim: increase focus and scale

- Focus on **areas where** joint EU action brings most value:
 - Tools and best practices for destinations – eg sustainability, crisis preparedness, balancing flows
 - Skills, data, technology, AI
 - Link to transport policy for a thorough approach to tourism and travel
 - Global presence: partnerships, international cooperation, branding
- Focus on **governance and structured cooperation**:
 - Build reliable implementation routines
 - Scale up jointly agreed reference criteria, tools and solutions



Our data: Eurostat



Free data available on [Eurostat's online database](#)

Statistics Explained articles

- ✓ Regularly updated
- ✓ Announced via **news articles** and **social media posts**

Latest news



EU tourism nights at record 3.08 billion in 2025

16 January 2026 >



Explore tourism trips of Europeans

13 January 2026 >



Tourism bookings via platforms grew in summer of 2025

8 January 2026 >

- Tourism (tour)
 - Tourism industries - monthly data (tour_indm) 
 - Nights spent at tourist accommodation establishments - monthly data (tour_occ_nim)  
 - Arrivals at tourist accommodation establishments - monthly data (tour_occ_arm)  
 - Net occupancy rate of bed-places and bedrooms in hotels and similar accommodation (NACE Rev. 2, I, 55.1) - monthly data (tour_occ_mnor)  
 - Tourism industries - annual data (tour_inda)
 - Occupancy of tourist accommodation establishments (tour_occ) 
 - Capacity of tourist accommodation establishments (tour_cap) 
 - Annual enterprise data for selected tourism industries (source: Structural business statistics) (tour_sbs)
 - Annual, monthly and quarterly enterprise data for selected tourism industries (source: Short term statistics) (tour_sts)
 - Annual and quarterly data on employment for selected tourism industries (source: Labour force survey) (tour_lfs) 
 - Occupancy and capacity of tourism accommodation establishments - historical data (1990-2011) (tour_inda_h)
 - Trips of EU residents - annual data (tour_dem) 
 - Participation in tourism (tour_dem_to)
 - Tourism trips (tour_dem_tt)
 - Tourism nights (tour_dem_tn)
 - Expenditure on tourism trips (tour_dem_ex)
 - Same-day visits (tour_dem_sdv)
 - Trips of EU residents - historical data (1996-2011) (tour_dem_h)
 - Accommodation offered via collaborative economy platforms - experimental statistics (tour_ce)
 - Occupancy - monthly data (tour_ce_om)
 - Occupancy - annual data (tour_ce_oa)

Regulation (EU) 692/2011 on Tourism Statistics

Supply and demand in tourism only in terms of *capacity* of tourist accommodation establishments, *occupancy* of establishments and *national demand* for participation in tourism.

- Need to revise, update and modernise
 - better covering new and emerging phenomena
 - ... but also re-evaluating current data output priorities
 - embracing the potential of new data sources and methods
 - ... but sustainability/continuity of data access and quality as a constraint
 - ... building on experiences with data from STR platforms and financial transactions data
 - enabling the measurement of the economic (and labour market) dimension of tourism and the sustainability of tourism (building on TSA:RMF and SF-MST)
- Known user expectations
 - increased punctuality and granularity of data (geographical, temporal, sectoral, product)
 - increased coverage (same-day visits, second homes, small accommodation facilities, ...)
 - tourism satellite accounts
 - environmental, social and economic sustainability of tourism

EUROSTAT 2026: Harmonised European indicators on the sustainability of tourism



- Set of indicators (mainly) based on existing official statistics
(avoiding additional burden on businesses and administrations)
- Approach: pragmatically bottom-up
(starting from relevant existing data series and creating meaningful indicators)
- Roll-out: start with a first set to kick-off the indicators set, then deepen and widen
(in parallel with new developments in terms of data sources and disaggregation techniques)
- Horizontal ambition: align and coordinate as much as possible with other international initiatives and within the European Commission
(UN Tourism SF-MST, OECD core indicators, MOVE/JRC EU Tourism Dashboard; but also build on work done at national and regional level – f.i. Andalusia)

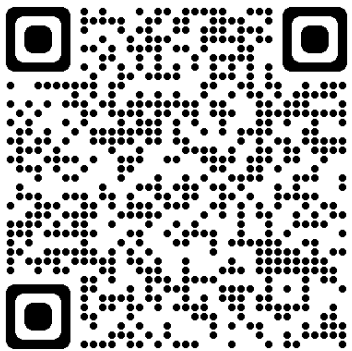


Economic dimension	
Topic	Indicator
Tourism share in the economy	Tourism direct gross value added at basic prices
Tourism share in the economy	Tourism direct gross domestic product
Tourism economic structure and international dependency	Inbound tourism expenditure
International position	Travel balance (BOP travel item – balance)
International position	Travel receipts (BOP travel item – credit)
Residents’ spending on tourism	Average expenditure per night during trips made by residents
Level/volume of tourism activity	Nights spent in tourist accommodation establishments
Level/volume of tourism activity and digitalisation	Guest nights spent in short-term rentals offered via online platforms
International dependency (generating markets)	Nights spent by visitors from the top 3 foreign markets in tourist accommodation establishments
Dynamics of tourism businesses	Survival rate in year t of enterprises in selected tourism industries newly born in year t–5
Employment in tourism industries	Persons employed or self-employed in tourism industries

Social dimension	
Topic	Indicator
Tourism participation	Participation in tourism by residents
Tourism pressure	Tourism density
Tourism pressure	Tourism intensity
Tourism pressure	Tourism intensity in peak month
Tourism pressure	Tourism concentration
Seasonality	Nights spent in tourist accommodation establishments in the 2 or 3 busiest months
Seasonality	Spread of monthly nights spent at tourist accommodation establishments (Gini coefficient)
Tourism labour market	Female workers in selected tourism industries
Remuneration in tourism industries	Relative gross hourly earnings in accommodation and food service activities
Tourism acceptance	To be developed and defined

Environmental dimension	
Topic	Indicator
Green mobility	Trips by airplane as main means of transport
Green mobility	Trips by train as main means of transport
Long-haul dependency	Arrivals by residents from outside Europe
Bathing water quality	Bathing waters classified as excellent quality
Emissions	To be developed
Energy use	To be developed

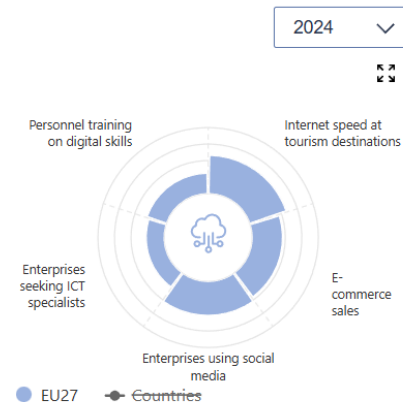
EU Tourism Dashboard



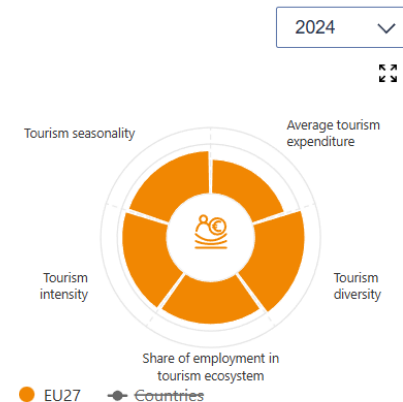
Green pillar (index)



Digital pillar (index)



Socio-economic pillar (index)



The EU Tourism Dashboard in a Nutshell

- Online knowledge portal to monitor the green and digital transition, trends and characteristics of the tourism ecosystem of European destinations. It includes:
 - [Indicator framework](#)
 - ... 30+ indicators / descriptors
 - ... EU27 + CH, IS, NO, at national and regional level
 - [Web-interface](#)
 - ... Interactive data visualisation
 - ... Data access (download and API)
- Publicly released in 2022, with annual updates every October.
- Specialised audience:
 - [Decision makers, tourism stakeholders, tourism experts and researchers](#)
 - [Average 355 unique visitors weekly \(Jan-Jul 2025\)](#)
- Developed by the European Commission (MOVE and JRC), in consultation with Member States (TAC) and other partners and stakeholders.
 - [Regular consultation rounds](#)



Indicator framework

- Selection of indicators determined by policy relevance and data considerations:
 - Data access and availability, completeness, consistency/comparability, frequency of updates.
 - Limited but meaningful list.
 - Dynamic framework: yearly revisions to the list are possible, based on changing policy criteria, and evolving data conditions.
 - Semantic interoperability
 - ... anchor to established definitions (e.g., Eurostat tourism glossary, tourism ecosystem definition, NACE, Tourism Satellite Accounts (TSA)).
 - ... use of NUTS nomenclature for definition of geographical statistical units.
- Multiple data sources and access methodologies:
 - Open web access (Eurostat, EEA, Ookla)
 - Direct exchange (Blue Flags, UNESCO, Eurocontrol, DG ENV, bank card data)
 - Web-scraping (TripAdvisor, AirDNA)



Indicator framework

Green pillar

- Air travel emission intensity
- Tourism GHG intensity
- Tourism energy intensity
- Share of trips by train
- Excellent bathing water
- Dependence on distant origins
- Environmental labels and schemes - *revised definition*

Digital pillar

- E-commerce sales
- Enterprises using social media
- Personnel training on digital skills
- Enterprises seeking ICT specialists
- Internet speed at tourism destinations

Socio-economic pillar

- Tourism intensity
- Tourism seasonality
- Dependence on top 3 countries of origin
- Tourism diversity
- Average tourism expenditure
- Direct economic contribution
- Share of employment
- Tourism enterprises by size
- Occupation by gender - *new*

Tourism descriptors (demand & supply)

- Nights-spent
- Arrivals
- Tourism capacity
- Occupancy rate
- Average duration of stay
- Tourism density
- Dominant tourism typology
- Share of foreign tourists
- Progress of tourism demand recovery
- Presence of Blue Flags awarded sites
- Share of protected/designated land
- Share of accommodations in areas with high-nature value
- Cultural assets density
- UNESCO and European heritage sites
- Share of STRs - *new*



EU Tourism Platform

EU Tourism Platform

Join ecosystem

Home

What's new?



Policy framework



Stakeholders' actions



Funding and support



Knowledge and learning



Interactive map

Community



Calendar

Single platform for the EU Tourism Transition Pathway

Discover actionable insights and strategies on the Transition Pathway Stakeholder Support Platform for EU Tourism ecosystem to drive sustainable growth and innovation in your tourism business.

Join the pathway >

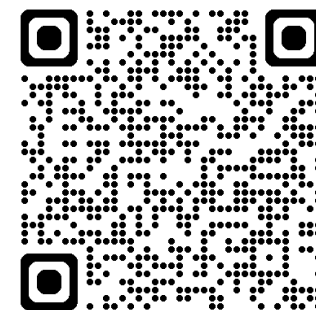


Photo by David Mar

Developing a trusted and secure Common European Data Space for Tourism



43 Partners



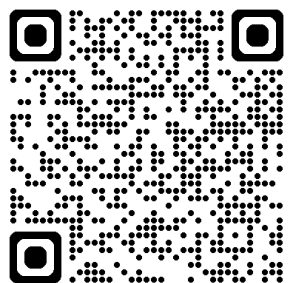
13 Countries



03 Years



05 Pilots

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Creation of a Competence Centre to support data management in tourism destinations

OBJECTIVES

The main objective of D3HUB is to design, test, pave the way and maintain a self-sustainable European Competence Centre to support tourism destinations and their ecosystem (with special focus on SMEs) in their data-driven green and digital transition, as well as to increase collaboration and knowledge transfer between tourism stakeholders and tourism destinations.

Build a knowledge support scheme to assist tourism destinations across the European Union

Provide tailor-made digital solutions and data for DMOs and tourism SMEs.

Test the already developed framework through a pilot run by a critical mass of DMOs.

Integrate results and learnings into a business plan to set up and sustain the Centre.

Upscale beyond the partnership and build a data-driven tourism community.

Implement the Centre and ensure its continuity.



Driving the Green and Digital Transformation of European Tourism



The main objective of **FACILITATE** is to **empower European tourism destinations to become more data-driven** by providing:

A **collaborative framework** that promotes data-driven decision making.

- **Tailor-made training and capacity building** for DMOs and tourism SMEs throughout Europe.
- **Access to digital tools and resources** to measure, compare and improve performance and sustainability.
- **Practical and updated guides** to improve data management and exchange, taking full advantage of the services developed by D3HUB, DEPLOYTOUR and other European initiatives.



Thank you



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