Futureproofing European Tourism Through Scenario Planning and Strategic Foresight

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A report produced for

the European Travel Commission

by the European Tourism Futures Institute

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This report was compiled and edited by the European Tourism Futures Institute (ETFI) at NHL Stenden University of Applied Sciences on behalf of the ETC Market Intelligence Group. Views and opinions expressed in this report are, those of the author(s) only and do not necessarily reflect those of the European Travel Commission (ETC) or the members of the multidisciplinary expert group.

Foreword

The tourism industry in Europe is facing a period of profound transformation. Global challenges, ranging from economic shifts and geopolitical tensions to technological disruption and climate change concerns, are creating a fast-moving environment that puts conventional planning models to the test.

National Tourism Organisations (NTOs) are at the forefront of this evolving reality. As the stewards of destination development and promotion, they must now not only prepare for the changes of today, but also for the complex uncertainties of tomorrow. In such context, there is a growing need for strategic tools that help tourism bodies anticipate trends, navigate complexity and build long-term resilience.

Recognising this imperative, the European Travel Commission (ETC) launched this initiative to explore how scenario planning can support NTOs in future-proofing their strategies and prepare for multiple potential futures. Looking ahead to 2035, this study sheds light on the forces most likely to shape European tourism in the coming decade while advocating for stronger tourism resilience.

This report is the result of a collaborative process designed to empower NTOs with tools for long-term thinking and forward-looking decision-making. More than a theoretical exercise, the project was rooted in active participation by bringing together experts and member organisations to co-create future narratives and translate them into actionable strategic insights.

By embedding foresight practices into tourism planning, ETC aims to foster a culture of anticipation, innovation, and proactive response. The findings of this study aim to serve as both a practical guide and a source of inspiration for building a future-ready European tourism sector, resilient, adaptable and capable of thriving in a world of constant change

Eduardo Santander

CEO/Executive Director

European Travel Commission (ETC)

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This report forms part of ETC's ongoing Market Intelligence Programme and was conducted under the guidance of Jennifer Iduh, Lyublena Dimova, Menno van IJssel, Cornelia Keller and Marie Guilleux (ETC Executive Unit), on behalf of ETC's Market Intelligence Group (MIG). We thank them for their strategic input and dedication to this forward-looking initiative.

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Your willingness to engage fully in the process was key to the project's success. The diversity of professional backgrounds represented in the group enriched the discussions and brought a wide range of perspectives to bear on the challenges and opportunities facing European tourism. Your collective insights, contributions and engagement were essential in identifying key drivers of change and uncertainties, and in shaping the exploratory scenarios at the heart of this work.

We are grateful for your time, commitment and the spirit of collaboration that defined this project. We thank you sincerely.

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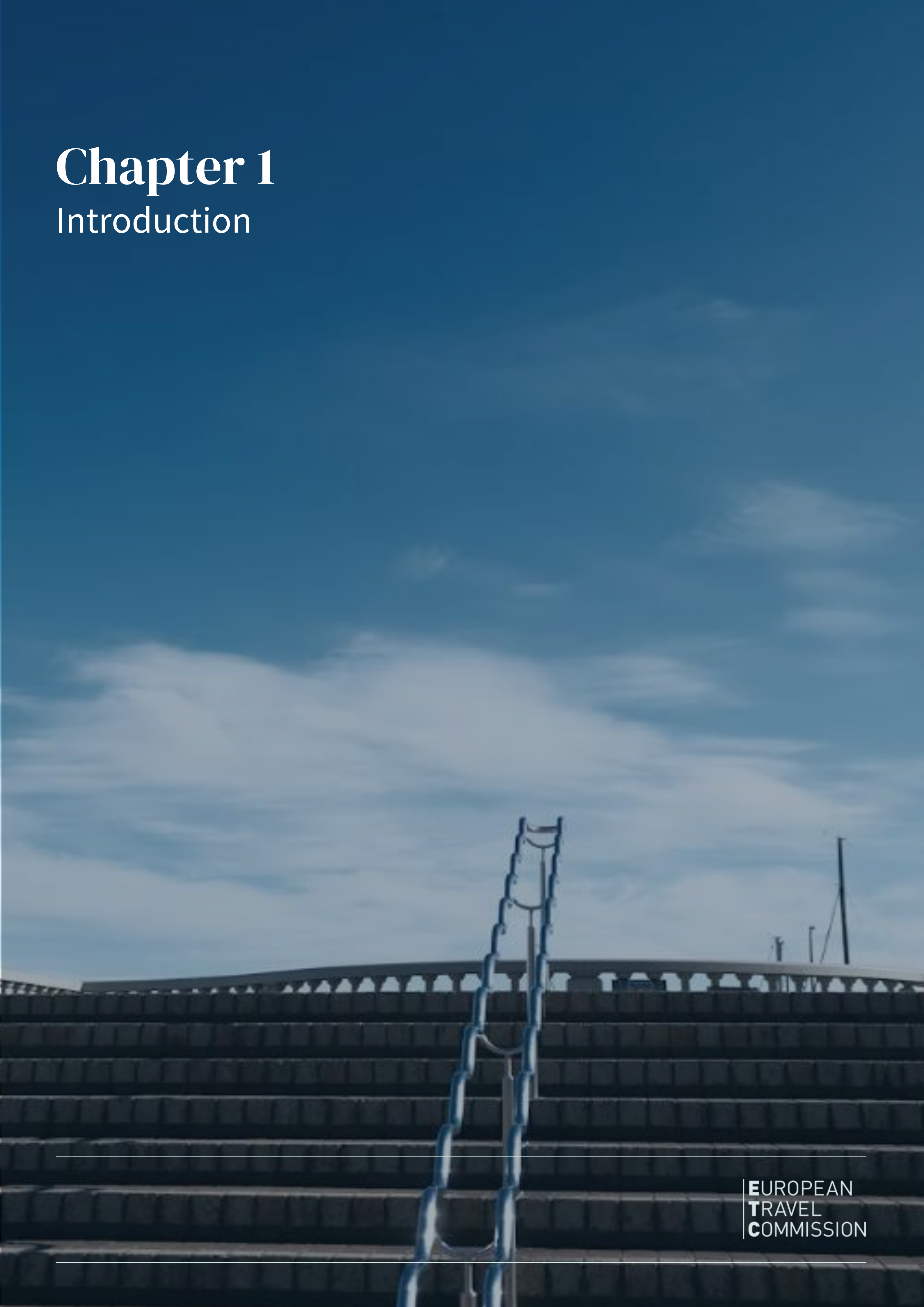

Introduction

A Challenging Forcefield

Today's society is characterised by complexity, rapid change, and high uncertainty. Factors such as technological advancements, demographic shifts, evolving consumer preferences, geopolitical instability, and climate change create a challenging landscape for the tourism industry. For National Tourism Organisations (NTOs), this dynamic environment makes anticipating future developments increasingly difficult, yet essential.

To successfully navigate these challenges and remain relevant, NTOs must become resilient and adaptive. Strategic foresight – specifically scenario planning, offers powerful tools for understanding and preparing for possible futures. Scenario planning does not predict the future; instead, it explores multiple plausible outcomes, enabling organisations to develop flexible strategies that are robust under various conditions.

This report presents the outcomes of a strategic foresight project designed to help NTOs anticipate and adapt to future developments in tourism. Using a structured and collaborative approach involving experts, key forces shaping tourism's future were identified and their potential implications through carefully constructed scenarios explored.

As such, this report serves to expand thinking, further explore unknowns, and offer structured guidance for making contemporary decisions that remain valid across different futures. For readers unfamiliar and/or interested in the methodology, a detailed explanation of the process is provided in Annex I.

Strategic foresight is a relevant tool for NTOs to anticipate and respond effectively to future uncertainties and emerging challenges.

Aim and Objectives

This report is the outcome of a study that aims to support National Tourism Organisations (NTOs) in anticipating and adapting to potential future changes in the tourism industry through scenario planning and strategic foresight, and eventually to enable NTOs to develop long-term strategies that strengthen tourism resilience and create a more resilient, innovative, and forward-looking environment for European tourism destinations. The time horizon is 2035.

Reading Guide

In the following chapters, readers will find:

- A clear explanation of the key drivers shaping the future of tourism - Chapter 2
- Four distinct scenario narratives built from these outcomes - Chapter 3
- Persistent Systemic Conditions in European Tourism to 2035– Chapter 4
- Recommendations and strategic actions for future-oriented tourism in Europe – Chapter 5
- Methods, drivers, extremes, and driver prioritisation - Annex I

Chapter 2

Driving Forces of Change

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Driving Forces of Change

To understand what is shaping the future of tourism through to 2035, it is essential to examine the underlying forces that are already influencing its development. These driving forces of change are drawn from experts' input and reflect key developments observed in the broader macro environment such as economic shifts, climate pressures, societal transformations, political tensions, and technological innovation.

Overview of Identified Drivers

In total, six overarching drivers of change have been identified. The future is shaped by the interaction of these six driving forces of change. Each represents a thematic force rooted in observed developments and shifts in the broader environment. Together, they provide a holistic picture of the evolving context in which European tourism is situated:

1. Climate Change

Climate change affects tourism directly through changing and increasingly extreme weather conditions, which lead to rising costs, shifting seasonality patterns, and operational disruptions. Indirect impacts include a loss of destination appeal due to deteriorating environmental, health, security, and weather conditions, alongside negative impacts on biodiversity and declines in tourism-related investments.

2. Fear of (Rapid) Change

Rapid technological and socio-cultural developments, shifting border policies, and political uncertainty generate instability and a sense of unease, fuelling populist politics, nationalism, workforce disruptions, and friction around migration.

3. Governance and Regulation at European Level

Better coordination across countries and institutions is required to address the current polycrisis, as well as other complex and transboundary challenges regarding sustainability, infrastructure, and geopolitical tensions.

4. Rise and Evolution of the Global Middle Class

The combination of an ageing European population and a growing younger middle class outside Europe, fuels inbound tourism to Europe. This is increasing pressure on popular destinations, iconic sites, and intensifies overtourism concerns. Meanwhile, emerging markets appear to reshape global tourism competition.

5. Generational Shift and Tourism Demand

Younger generations increasingly demand sustainable, flexible, and authentic experiences. Hybrid travel, digitalisation, virtual tourism, and shifting cultural engagement patterns are transforming the tourism offer.

6. Labour and Skills Challenges

Labour shortages, skills mismatches, and uneven technological adoption challenge the supply side of tourism, especially as new traveller expectations and digital ecosystems evolve.

Note on methodology: The drivers are derived from an expert workshops and structured trend analysis. As part of this process, the drivers were assessed on their impact and uncertainty. This step helps distinguish structural trends from critical or key uncertainties and forms the foundation for the scenario framework.

Building blocks for plausible futures

The six drivers described in the previous section form the foundation upon which the scenarios are built. Yet their role in scenario logic varies based on their impact and level of uncertainty.

At the core of the scenario framework are two key uncertainties: **European governance and regulation (3**) and **generational shifts in demand (5)**. These represent critical turning points. Their opposing extremes *(see Annex I)* illustrate how dramatically the tourism landscape could diverge depending on how these forces evolve. As such, they form the axes of the scenario framework. We refer to these as *key uncertainties*: they stretch our imagination, challenge assumptions, and open up new ways of thinking about the future.

In contrast, **climate change (1)** and the **rise and evolution of the global middle class (4)** are characterised by high impact but lower uncertainty. Their influence is consistent across all future scenarios, exerting a more continuous form of pressure regardless of which path unfolds. We refer to these as *givens*. Finally, the remaining drivers, **fear of (rapid) change (2)** and **generational shifts on the supply side (6)** play a more contextual role. They are not central to scenario logic, yet they interact with and are shaped by the uncertainties.

Future scenarios are framed by the plausible extremes of the two driving forces that are most powerful and most uncertain.

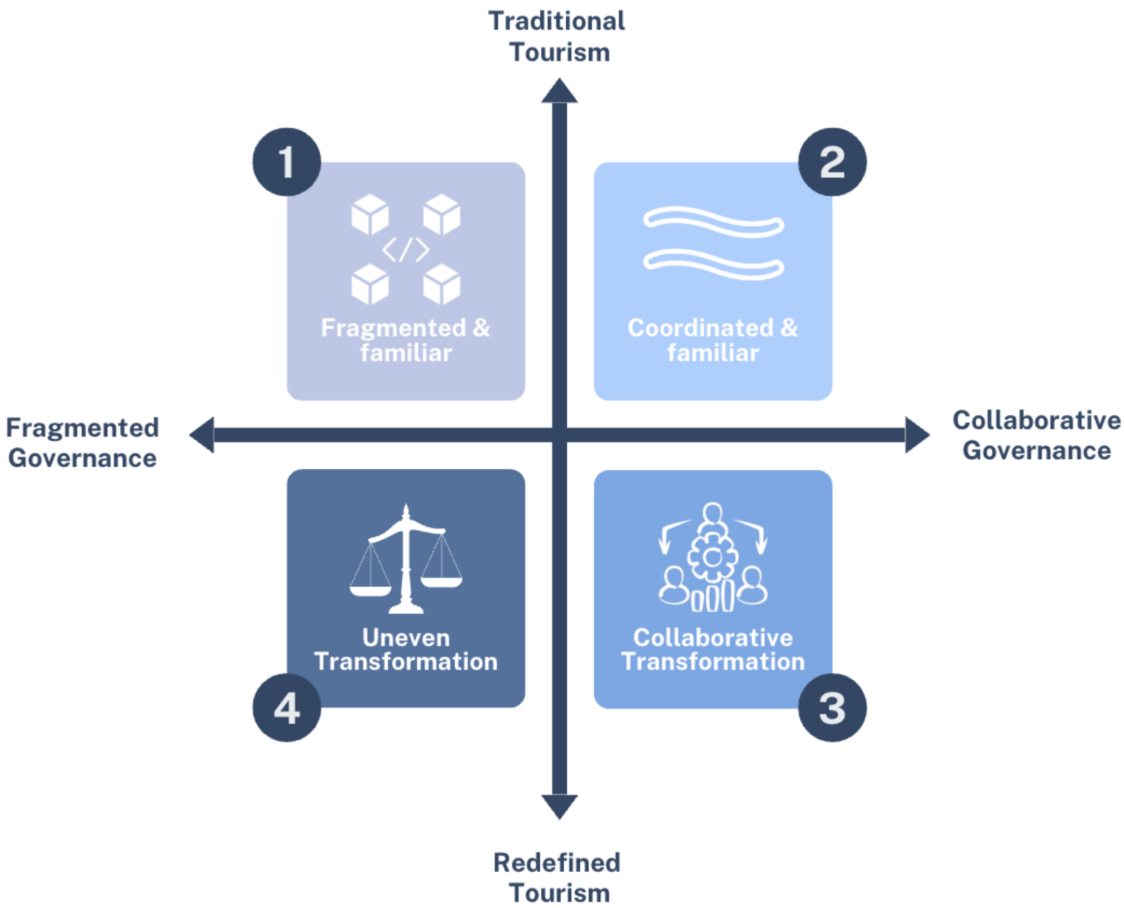
By understanding the underlying momentum (givens) and imagining uncertainty, we are now equipped to explore four distinct and plausible futures. Each scenario integrates these elements in a unique way, offering valuable perspectives on what tourism in Europe might look like by 2035.

Chapter 3
Four Scenarios

Four Scenarios

This chapter presents four plausible futures for tourism in and to Europe, each shaped by the interplay of **two key uncertainties**: the evolution of generational tourism demand and the level of collaborative governance at the European scale.

By placing two key uncertainties onto two axes that are perpendicular to each other, four distinct scenarios emerge. As emphasised in the introduction, these scenarios are not predictions but structured stories that help explore how tourism might evolve under different conditions. They describe how the world might look in 2035 if these forces unfold in particular ways. While each scenario offers a unique future, they all incorporate the givens described in the previous chapter: climate change and the rise of the global middle class. These givens act as constant influences across all four futures, although their expression is shaped by the context of each scenario. The four scenarios delineate the outer edges of the future playing field.



The scenarios should not be interpreted as predictions; rather, they represent the boundaries of the future playing field, similar to the corners of a billiard table.

SCENARIO 1: FRAGMENTED AND FAMILIAR

KEY UNCERTAINTIES

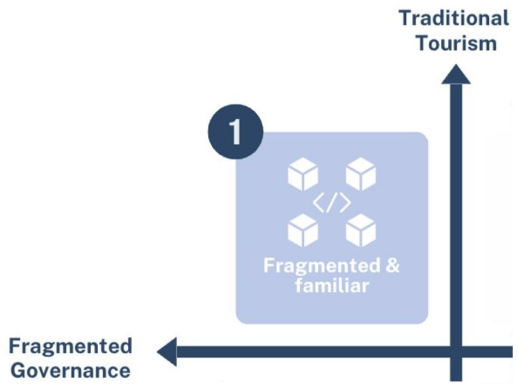
- **Low** EU collaboration
- **Low** generational demand shift

GIVENS

- Climate change
- Expanding middle class

OTHER

- Fear of change
- Generational supply shift



DEMAND SYSTEM

Middle class: demand grows, focus on iconic sites, straining systems.
New generations: underserved, driven by low prices, algorithmic defaults and lack of alternatives.
Travel format: long stay, hybrid and digital nomads are not more recognised or adapted than now.

GOVERNANCE AND SOCIETY

EU-level governance: low coordination, excluded from larger agendas, national silos.
Redistribution and system equity: inequitable, major destinations dominate attention and resources.
Mass tourism and sentiment: unmanaged growth fuels backlash, widespread protest.

SUPPLY AND DELIVERY SYSTEM

Role of SMEs

Marginalised by cost pressures and platform dependency

Product Offer

Mass-market, iconic-site-driven, short-term focused

Innovation Capacity

Fragmented, underfunded, low visibility and hard to scale

OPERATIONS & SYSTEM INFRASTRUCTURE

Climate Adaptation & Mitigation

Not prioritised, reactive, low adaptive capacity, highly vulnerable destinations

Tech Platforms and Infrastructures

Big tech dominates, platforms steer masses, used to optimise (cost) efficiency and convenience

Data

Data availability increased but remains under-utilised, unstandardised and fragmented

Scenario 1: Fragmented and Familiar

Foundations of Change

Looking back from 2035, European tourism has evolved unevenly under continued gaps in EU-level governance and the system's limited progress to adapt to generational shifts in demand. Rising nationalism and diverging national interests blocked deeper integration, while market forces reinforced mass-market dynamics. Despite growing interest in value-driven and immersive experiences, younger travellers found limited (affordable) alternatives to traditional tourism. The continued growth of the global middle class, combined with limited adaptation to climate risks, have left tourism systems reactive. The sector remains shaped by fragmented regulation, global tech platform dominance, and destination strategies often driven more by short-term market pressures than by systemic resilience.

Tourism System Dynamics

Demand
The continued rise of the global middle class, particularly in Asia, Africa, and the Middle East, supports sustained demand for travel to Europe. At the same time, market polarisation is increasing as wealthier travellers are able to adjust to higher prices, while low-income travellers face growing barriers to affordability. Long-haul travel remains complex and expensive due to fragmented visa procedures, carbon pricing, and rising operational costs. These developments are further shaped by inconsistent climate regulations, declining disposable incomes, and a rise in precautionary saving as pension systems come under pressure.

Despite these challenges, Europe's most recognisable destinations continue to attract large numbers of visitors. Mass tourism remains widespread, as they are driven by digital platforms that optimise for ease, low cost, and reach. Cruise tourism, wellness travel, and rural tourism are expanding, driven by an ageing European population and the rise of affluent middle-class travellers from emerging markets. Visitor patterns remain largely volume-driven and convenience-oriented, with demand still concentrated around iconic destinations.

At the same time, competition from the Arabian Peninsula has intensified, driven by its significant growth in market share. After two decades of heavy investment, the region has emerged as a hub for high-end, spectacle-driven tourism and events. Its proximity to Asian markets, streamlined entry, and lighter regulation make it an attractive alternative. While Africa remains equally positioned between both regions, the Gulf's rapid rise increasingly draws middle-class travellers seeking modern, luxurious experiences.

Supply and delivery
Many small and medium enterprises (SMEs) face challenges in adapting, caught between growing dependence on digital platforms and rising operational costs. Few can influence demand flows or gain visibility outside platform algorithms. Product innovation remains fragmented, often underfunded, and difficult to scale beyond isolated initiatives. At the same time, more price-sensitive consumer behaviour increases pressure on SMEs to compete on cost, reducing margins and discouraging experimentation.

Younger generations show growing interest in meaningful and value-aligned experiences, yet the current system offers little room for SMEs to meet this demand in a visible, viable, or scalable way. At the same time, cultural tourism is becoming more focused on convenience. Popular booking platforms and online visibility have a greater impact on visitors' experiences than local stories. This results in a slow loss of cultural authenticity, where staged performances take the place of real participation, and local traditions are adjusted to meet visitor expectations.

Operations and system infrastructure
Climate change impacts are accelerating, but adaptation remains patchy. Insurance costs, operational expenses, and the frequency of extreme weather events have risen, yet investments in climate-resilient infrastructure are uneven. In many destinations, short-termism dominates, with authorities more focused on immediate political pressures than on long-term transformation. The cascading effects of polycrisis further expose the fragmentation of governance. At the same time, climate mitigation receives limited attention: high-impact transport modes persist, and few destinations have implemented meaningful shifts in mobility or emissions reduction.

Despite the increasing availability of data, impact tracking remains fragmented and confined to regional or national levels. Without standardised systems, economically empowered SMEs, and under the ongoing pressures of mass tourism and rising operational costs, destinations struggle to translate insights into planning, decision-making, and behavioural feedback. Digital infrastructure continues to prioritise cost efficiency and optimisation, rather than transparency, participation, or co-creation.

Governance and society
European tourism continues to operate within fragmented national frameworks. Despite mounting environmental pressures, governance remains reactive with inconsistent national policies and localised, tactical responses to climate change. Cross-border coordination on mobility, sustainability, or crisis management remains weak. While some countries impose caps, taxes, or restrictions, others pursue open growth strategies, widening disparities between destinations. Major destinations continue to dominate political attention and funding, reinforcing long-standing imbalances between high-profile locations and peripheral regions.

Within this context, local protests and resident dissatisfaction intensify, leading to reactive, fragmented tourism regulation at municipal or regional levels. Some cities impose new caps or fees, while others remain largely unregulated, resulting in inconsistent visitor experiences and rising tensions. Tourism increasingly becomes a source of social conflict, with policy shaped more by short-term pressure than collective vision. Residents in overvisited areas express growing frustration as crowding, housing stress, and inequality undermine local quality of life.

The lack of a consistent, overarching governance framework makes it difficult to respond systemically to growing threats and pressures. As a result, opportunities to align demand, supply, and infrastructure remain underutilised. Value-driven travellers encounter few structural incentives or alternatives. SMEs, though central to innovation, often operate without systemic support. Key systems like data, mobility, and adaptation remain fragmented, limiting the sector's ability to plan, coordinate, or respond collectively.

Threats and Opportunities

Threats
The absence of a systemic and coordinated European tourism framework weakens collective response capacity. As extreme weather events and political instability increase, destinations rely on localised, reactive governance. This creates policy vacuums, inconsistent adaptation, and missed opportunities for long-term investment, especially in climate-vulnerable areas.

Large tech companies shape demand through algorithmic control and price-based competition. This system is effectively imposed on destinations, which lack the collective power and tools to influence or regulate it. Local SMEs often lack negotiation power or marketing reach and thus face margin pressure and limited visibility. Besides, the majority of the large tech companies are located outside Europe, which leads to an enormous revenue leakage. Without consistent frameworks or alternative ecosystems, innovation and meaningful local entrepreneurship is fragile.

Uncoordinated tourism pressures, particularly in high-volume destinations, trigger mounting protest and social tension. Rising resident dissatisfaction and tourism fatigue provoke short-term political responses. These lead to inconsistent regulations, growing tensions between stakeholders, and ultimately, damage to trust and destination reputation.

Opportunities

The expansion of the global middle class, particularly in Asia and the Middle East, provides a steady influx of long-haul visitors. Despite fragmented systems, European heritage and cultural icons continue to attract large numbers of visitors, maintaining economic relevance for high-profile destinations.

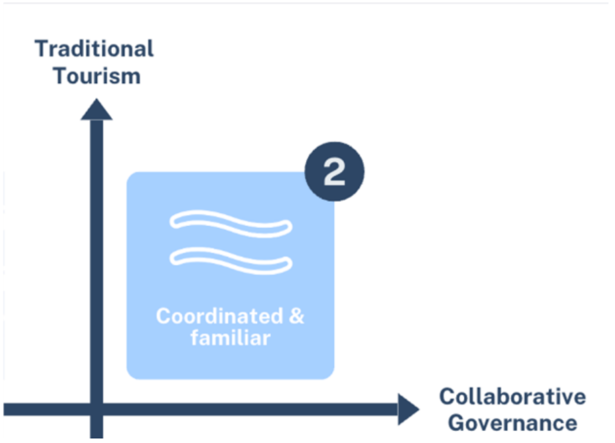
Older European travellers drive demand for other forms of travel, such as wellness, off-season travel, rural escapes, and accessibility-driven offers. These trends create opportunities for underused regions to attract visitors with slower-paced, off-season, and less commodified experiences.

In the absence of strong central governance, some regions turn this gap into an opportunity. Micro-resilience strategies, value-based experiences, or regional branding initiatives emerge where leadership aligns with local capacity, often driven by community or SME networks seeking to meet the demand for more meaningful travel. Though scalable only in pockets, these efforts offer glimpses of transformation from below.

SCENARIO 2: COORDINATED AND FAMILIAR

KEY UNCERTAINTIES

- **High** EU collaboration
- **Low** generation demand shift



GIVENS	OTHER
▪ Climate change ▪ Expanding middle class	▪ Fear of change ▪ Generational supply shift

DEMAND SYSTEM

Middle class: demand grows, focus on iconic sites, tourism demand is better directed.
New generations: underserved, acknowledged by policy, but rarely reflected in mainstream travel.
Travel format: long stay, hybrid and digital tourism is marginal and remains short-term focused.

GOVERNANCE AND SOCIETY

EU-level governance: strong coordination, but underutilised due to correlated demand.
Redistribution and system equity: redistribution systems exist but have limited behavioural effect.
Mass tourism and sentiment: better managed via caps and controls, resident voices remain secondary.

SUPPLY AND DELIVERY SYSTEM

Role of SMEs
Marginalised by cost pressures, supported institutionally, but sidelined in platform-driven demand flows

Product Offer
Mass-market mainstream, iconic sites, superficial sustainability

Innovation Capacity
Funded in niches, lacks connection to dominant travel flows

OPERATIONS & SYSTEM INFRASTRUCTURE

Climate Adaptation & Mitigation
Addressed through policy, not embedded in products or destination DNA

Tech Platforms and Infrastructures
Visibility shaped by commercial logic, policy present, big-tech control, systems for efficiency not transformation

Data
Data availability increased, mostly used for destination management, marketing and crowd control

Scenario 2: Coordinated and Familiar

Foundations of Change

Looking back from 2035, Europe's tourism system evolved under a growing political will for cross-border collaboration and stronger EU coordination. Systemic shocks, climate urgency, and rising digital complexity pushed tourism to the core of Europe's regulatory agenda. Yet, the system's deeper structures proved resistant to change. The tourism industry remained largely focused on visitor numbers and standardised experiences. Consumer habits, the dominance of global platforms, and persistent cost constraints limited the scope for deeper transformation. As a result, the sector became better managed but not redefined.

Tourism System Dynamics

Demand

Tourism demand remains overwhelmingly shaped by the dominance of global booking, social platforms, and consumer habits shaped by reduced disposable incomes, rising travel costs, convenience, and gaps between intention and behaviour. Additionally, computer algorithms used by platforms and AI-agents that assist consumers with booking, planning, finding experiences, etc., prevent them from moving beyond mainstream options and discovering alternatives. As a result, most travellers are funnelled towards iconic destinations, well-known landmarks, and traditional experiences.

While alternative experiences exist, they remain marginal and unable to match the reach, speed, and prices of dominant distribution systems. Younger generations express growing interest in value-driven, immersive travel, but these preferences are only partially represented in mainstream offerings. While such values are acknowledged in policy, they struggle to break through the inertia of existing systems.

The rise of the global middle class, especially from Asia, Africa, and the Middle East, has intensified this effect. International arrivals have grown significantly, but flows remain concentrated around iconic sites, stressing high-profile destinations despite efforts to spread demand. While many of these travellers follow the dominant imagery of 'Europe as destination', the Arabian Peninsula increasingly competes for their attention, offering proximity, streamlined access, and heavily marketed, high-end alternatives that rival Europe's appeal.

Lastly demand for long-stay, hybrid, and remote work formats remains a marginal segment. Despite growing interest, the tourism model remains anchored in short-term planning, limiting the uptake of slower and immersive forms of travel.

Supply and delivery

Overall, supply systems are more stable, and equipped to respond to pressure, and thus more robust. However, there is not a fundamental redefinition of service delivery. The product landscape is dominated by iconic, mass-market experiences optimised for online visibility, convenience, and scale. While value-based alternatives exist, they often remain superficial, offered as optional layers on top of conventional packages.

SMEs benefit from improved access to funding, support programmes, and formal governance structures. However, their ability to shape demand remains constrained. Most struggle to gain online visibility beyond platform algorithms and must adapt to traveller preferences shaped by affordability and convenience. Even with support, experimental or value-based offers rarely gain traction, as most customers continue to choose low-cost, familiar options.

Local innovation is present but unevenly distributed. Policy frameworks allow for experimentation, yet real innovation capacity is mostly confined to niche segments or pilot projects. Initiatives lack the reach or online visibility to scale beyond isolated destinations.

Cultural tourism remains an important segment, yet it is increasingly curated for ease and uniformity. Experiences are tailored to meet traveller expectations rather than rooted in community narratives. As a result, authenticity gives way to performance and immersive engagement becomes a marketable add-on rather than a core offering.

Operations and system infrastructure
Destinations across Europe have strengthened their adaptive capacity and hazard resilience as tourism has become part of the climate agenda. Still, they are increasingly impacted by extreme weather, insurance volatility, and rising operational costs. Climate mitigation measures, such as carbon pricing and mobility policies to boost international travel by rail are in place, but high-emission transport modes remain widespread. Overall, investments focus on risk management and maintaining continuity, rather than enabling structural transformation.

Digital tools and interoperable data systems have expanded, enabling smart crowd control, capacity caps, and real-time adjustments to visitor flows. Iconic cities now manage crowds better and pressure on housing and public space has eased in some places. Yet these systems primarily reinforce familiar patterns as they help destinations cope with pressure, not transform it. Data is used for oversight and efficiency, but rarely for becoming more transparent with regards to redistributing value or supporting alternative forms of tourism.

Governance and society
Tourism has been embedded in wider EU agendas on climate, mobility, and digital transition, with collectively enforced policies shaping investment, regulation, and destination oversight. National tourism ministries, NTOs, and DMOs operate within a structured system that enables cross-border coordination, standardised regulations, and balanced funding mechanisms.

Redistribution tools such as capacity caps, dynamic pricing, and targeted investment help ease pressure on high-profile destinations and support secondary regions. However, behavioural change remains limited, and many travellers still gravitate towards iconic sites, limiting the broader effect of these interventions. While funding exists to support alternative offers, structurally weaker or less visible regions still struggle to compete within platform-dominated visibility systems.

Resident sentiment in major destinations has improved due to better crowd management, reduced housing pressure, and stricter regulations. Yet local participation in tourism planning remains uneven. Policies often prioritise visitor experience and macro-level performance, with resident concerns addressed through mitigation tools rather than a co-designed vision.

Threats and Opportunities

Threats
Despite improved regulation and system-level governance, dominant mass-market structures persist. Familiar booking flows, icon-focused content, and convenience-driven behaviour crowd out deeper forms of engagement, keeping tourism locked in a superficial paradigm and limiting the impact of innovation.

Global platforms continue to steer traffic towards popular landmarks and well-known cities. Even within a coordinated policy environment, lesser-known destinations and SMEs struggle to break through algorithmic defaults and the digital divide. Funding for local platforms and alternative products exists, but tourist attention remains unequally distributed. This reinforces geographic imbalances, particularly where platform logic disadvantages destinations lacking viral appeal or strong marketing infrastructure.

While regulation has improved conditions in many hotspots, cultural experiences are increasingly curated to meet tourist expectations, raising concerns around authenticity, resident alienation, and cultural commodification. This raises concerns among residents, particularly when policy tools are perceived as favouring visitor comfort over community narrative.

Despite improved cooperation, climate pressures remain relentless. Some southern and coastal areas face chronic disruption. Risk absorption has improved, but adaptation costs continue to rise, requiring sustained investment and flexible governance responses.

Opportunities

The integration of tourism into Europe's climate, mobility, and digital transition agendas creates a strong strategic foundation. Coordinated regulation, impact transparency, and adaptive frameworks strengthen resilience and enable proactive responses to systemic shocks.

Redistribution mechanisms, such as dynamic pricing and strategic investment, begin to ease pressure on overvisited areas. Secondary regions benefit from improved access, infrastructure upgrades, and inclusion in more balanced visitor flows. While challenges remain, visibility gaps can partially be addressed through smarter mobility systems and platform dialogues.

A safer space for experimentation has emerged. Within this coordinated governance structure, local and national actors can test pricing models, carbon tracking tools, and digital engagement strategies without losing alignment with broader EU goals. This fosters a culture of iterative innovation and increases institutional confidence in scaling alternative offers.

Some niche products, particularly immersive or sustainability-oriented offers, are beginning to gain traction. Trust in institutional backing and stable policy frameworks allow these products to gain mainstream consideration, even if uptake remains modest. The system is not transformative, but it enables adaptation within familiar bounds.

Each scenario represents an extreme yet plausible picture of the future and has its own specific features, opportunities and threats.

SCENARIO 3: COLLABORATIVE TRANSFORMATION

KEY UNCERTAINTIES

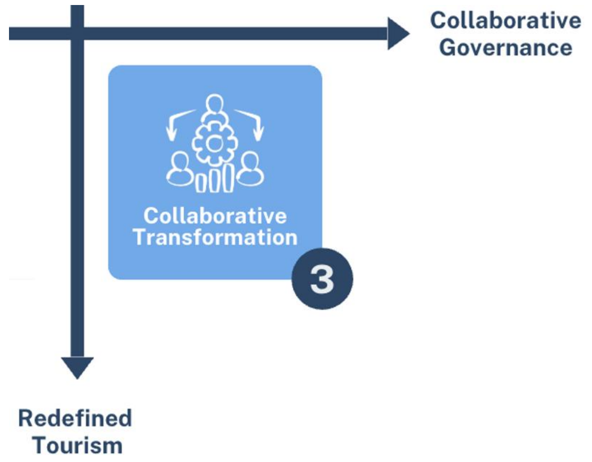
- **High** EU collaboration
- **High** generation demand shift

GIVENS

- Climate change
- Expanding middle class

OTHER

- Fear of change
- Generational supply shift



DEMAND SYSTEM

Middle class: demand grows, channelled into diverse, immersive, long-stay travel offers.
New generations: actively co-create offers, preferences drive innovation and participation.
Travel format: long stay, hybrid and digital nomads are supported by regulation, policy and co-living.

GOVERNANCE AND SOCIETY

EU-level governance: strong coordination, cross-sectoral collaboration, adaptation and experimentation.
Redistribution and system equity: equity is embedded in access, policy, investment and design.
Mass tourism and sentiment: managed through co-design, regeneration and balanced flows.

SUPPLY AND DELIVERY SYSTEM

Role of SMEs

Marginalised by cost pressures but central actors in innovation, immersive tourism, co-creation and regeneration

Product Offer

Diverse, immersive, slow, place-based and participatory offers dominate the market

Innovation Capacity

Systemically supported, scaled and aligned with goals of the broader system

OPERATIONS & SYSTEM INFRASTRUCTURE

Climate Adaptation & Mitigation

Addressed through policy, embedded in products, marketing, mobility and destinations DNA

Tech Platforms and Infrastructures

System redesigned for public values, visibility and transparency logic. Main use for co-creation, immersiveness, new forms of cultural experiences

Data

Standardised across sectors and regions, supports value-aligned offers, local impact, and equitable transparency

Scenario 3: Collaborative Transformation

Foundations of Change

Looking back from 2035, European tourism transformed through a combination of strengthened EU governance and a generational shift in demand. Faced with systemic disruptions, rising climate pressures, and growing demands for equity tourism is pushed into the heart of Europe's transition, mobility and digital transition agenda. Simultaneously, new preferences of the global middle class and younger generations' demand for purpose-driven experiences, drove innovation in products, services, and governance. The sector evolved toward adaptive, collaborative models prioritising resilience, community benefit, and meaningful engagement.

Tourism System Dynamics

Demand

By 2035, tourism in Europe is no longer shaped primarily by volume, convenience, or online visibility. Younger generations across Europe and beyond increasingly seek immersive, participatory, and value-driven travel experiences. These preferences have become mainstream and influence demand across the tourism system.

An ageing European population and a younger, globally-mobile middle class shape complementary trends: longer stays, value-driven choices, wellness, slow travel, and immersive learning experiences, often allocated to 'secondary' destinations. While high costs have limited some market segments, collaborative policy ensures that EU citizens retain broad access to sustainable, inclusive travel within Europe.

Travel choices are now shaped by purpose, participation, and regenerative intent, rather than by brand recognition or low-cost optimisation. Demand for long-stay, hybrid, and co-created travel formats has expanded, supported by flexible regulation, cultural curiosity, lifestyle flexibility, and digital integration.

Supply and delivery

Europe's tourism supply has shifted toward regeneration, participation, and shared purpose. Immersive and value-based travel now forms the backbone of many destination offers, replacing brand-driven packages with co-created, narrative-rich experiences. AI-driven travel companions suggest real-time activities that align with travellers' values, such as local workshops, ecological initiatives, or community events. Rather than selecting destinations by brand or image, travellers choose which local stories to join and contribute to.

DMOs, SMEs, and platform providers use integrated tools such as AR navigation, token-based incentives, and community feedback systems to support locally rooted, real-time experiences. Digital infrastructure encourages visitors to engage in place-making, from mapping overlooked areas to contributing content or co-funding local projects. The tourism supply system is no longer centred on scale or efficiency, but on shared benefit, creativity, and lasting connection. Tourism products are increasingly relational and designed in a way that blurs the line between host and visitor, and to foster long-term connection.

Accommodations are less dominated by the 'hard brands', introduced by SMEs, cover a wider range of niches and can consist of co-living conditions with local inhabitants. The choice for accommodation and activities is increasingly made based on value driven criteria such as current local pressure, economic leakage, and revenue distribution.

Operations and system infrastructure
Climate pressures continue to intensify. Rising operational costs, extreme weather, biodiversity loss, and escalating insurance premiums place growing strain on destinations and operators. Many coastal and southern European regions face chronic disruptions. However, Europe's integrated governance, public-private partnerships have enabled a shift toward adaptive capacity, resilience, and collective learning. Not all impacts are avoidable, but destinations absorb shocks to the best of their ability, while adjusting accordingly.

Destinations actively manage capacity and flows. Real-time digital systems, AI-supported travel companions, and harmonised policy tools steer visitors toward distributed, value-aligned experiences. Data is used not only for crowd control but to support ecological thresholds, social equity, and long-term planning. Balanced investment, dynamic governance, and transparent data enable destinations to safeguard local quality of life while coordinating responses across regions.

Governance and society
European tourism is shaped by strong, coordinated governance. EU-level frameworks guide national and regional adaptation, aligning tourism with broader agendas on climate, mobility, and inclusion. Common principles for carbon pricing, impact monitoring, and adaptive regulation provide a shared foundation while still allowing for local experimentation and differentiated implementation.

Redistribution mechanisms are embedded across funding, online visibility, and policy, ensuring that benefits are not limited to iconic destinations. Peripheral and emerging regions gain support through targeted investment and coordinated flow management, reducing pressure on over-visited areas and enhancing cohesion across the tourism landscape.

Resident participation is integral to governance. Tourism development is guided by co-design, local regeneration strategies, and inclusive stewardship models. Communities play an active role in shaping tourism's impact. As a result, tensions around crowding and inequality are addressed through long-term collaboration rather than reactive regulation. Regulations regarding flexible visa schemes, digital infrastructure, and co-living policies have enabled hybrid travellers, digital nomads, and civic nomads to stay longer and integrate more deeply, allowing visitors to live, work, and contribute to local initiatives for weeks or months.

Threats and Opportunities

Threats
While tourism is more inclusive by design, rising travel and adaptation costs risk making participation inaccessible for lower-income groups. Without continued policy attention, inclusive travel could become aspirational rather than a lived reality.

New governance frameworks bring complexity. Navigating EU regulation, digital compliance, and sustainability standards requires time and resources. While the system supports innovation, not all SMEs are equipped to keep up, potentially reinforcing digital and administrative divides.

Despite improved infrastructure and planning, climate pressures remain relentless. Some southern European and coastal areas face chronic disruption. Risk absorption has improved, but adaptation costs continue to rise, requiring sustained investment and flexible governance responses.

Opportunities

Tourism is embedded in broader EU transitions, with real-time data, adaptive regulation, and impact-driven investment. This creates a resilient foundation for coordinated action, cross-border learning, and forward planning in a turbulent decade.

Shared storytelling, ecological engagement, and participatory formats are now mainstream. The relationship between travellers and communities has shifted from transactional to relational, reinforcing mutual benefit and place-based connection.

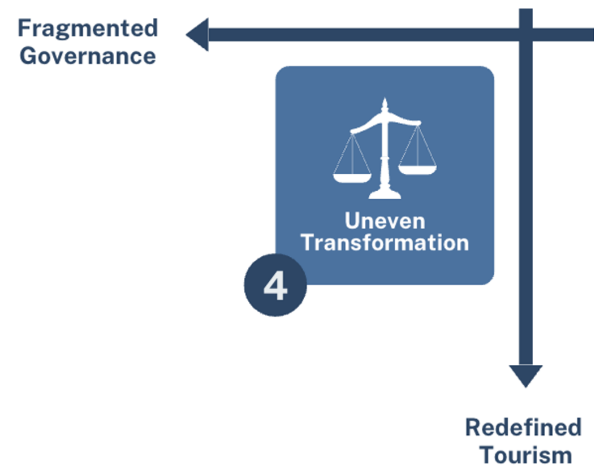
Traveller behaviour is now more aligned with public goals. Purposeful choices support climate targets, regional equity, and cultural revitalisation. As preferences and policies reinforce each other, positive feedback loops emerge, strengthening the tourism system's contribution to Europe's wider societal transitions.

SCENARIO 4: UNEVEN TRANSFORMATION

KEY UNCERTAINTIES

- **Low** EU collaboration
- **High** generation demand shift

GIVENS	OTHER
▪ Climate change ▪ Expanding middle class	▪ Fear of change ▪ Generational supply shift



DEMAND SYSTEM

Middle class: demand grows, but demand diversification and innovation are absorbed unevenly.
New generations: embraced by innovators, fragile and limited reach due to lack of structure.
Travel format: long stay, hybrid and digital tourism emerges in adaptive destination but ad hoc.

GOVERNANCE AND SOCIETY

EU-level tourism governance: low coordination, excluded from larger agendas, national silos.
Redistribution and system equity: regional divides deepen despite local experimentation.
Mass tourism and sentiment: mixed, deep participation in some places, rising tensions in others.

SUPPLY AND DELIVERY SYSTEM

Role of SMEs

Marginalised by cost pressures, experiments with new forms of tourism, fragile due to lack of support and scaling power

Product Offer

Diverse and creative, but unrestricted and inconsistent

Innovation Capacity

Funded in niches, innovative, but fragile due to fragmented support

OPERATIONS & SYSTEM INFRASTRUCTURE

Climate Adaptation & Mitigation

Reactive, underfunded and uneven, vulnerable, low level adaptive capacity and resilience

Tech Platforms and Infrastructures

Used creatively in regions, platforms bypassing emerges, lack of research and coordination. Harnessed for co-creation and real-time experience. Remains fragile.

Data

Data availability increased but remains underutilised, unstandardised and fragmented

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Scenario 4: Uneven Transformation

Foundations of Change

Looking back from 2035, Europe's tourism sector has undergone significant reinvention, driven from the ground up but lacking overarching coordination. Destinations, communities, and new market actors drove innovation in response to changing traveller values, digital possibilities, and the continued growth of the global middle class. Yet, the absence of an EU-wide tourism governance system meant that responses remained fragmented, reactive, and unevenly distributed across the continent and countries. Climate disruptions intensified, but systemic responses remained limited. While immersive, regenerative, and co-created forms of tourism flourish in some destinations, disparities persist in innovation, equitability, quality, adaptive capacity, and the ability to scale or extend successful models across regions.

Tourism Supply Dynamics

Demand

By 2035, the tourism experience across Europe is radically different, but wildly inconsistent. Value driven travellers, particularly from younger generations and emerging global middle classes, seek immersive, participatory, and identity-affirming experiences. In response, many destinations have embraced new forms of tourism: co-created events, live cultural exchanges, ecological restoration projects, and augmented storytelling have become more common.

In certain regions, long-stay, hybrid, and digital nomad travel formats have emerged, but in the absence of supportive visa schemes or infrastructure, these remain ad hoc rather than being embedded. The global middle class, especially from Asia and the Middle East, is now a major driver of inbound tourism. Demand is strong, but destination readiness is uneven. Some regions welcome this shift with innovative, participatory products; others remain stuck in volume management or overwhelmed by crowding. Older European travellers, in parallel, continue to shape long-stay, wellness, and accessibility-oriented tourism, but infrastructure adaptations are inconsistent.

Supply and delivery

Many SMEs drive creativity at the product level, but without stable funding or policy support, scaling is limited. Tourism innovation thrives mostly where local leadership, digital tools, and community networks align. But the lack of overarching governance leaves these efforts unequally divided and vulnerable to market shifts, crises, and political neglect. The visitor-host relationship deepens in some places, yet elsewhere, overuse, protest, and fatigue persist. While some regions experiment with rail tourism and local train-based offers, the absence of EU-level coordination means systemic barriers persist. Fragmented pricing, poor connectivity, and limited booking integration continue to constrain train travel as a sustainable and affordable alternative to aviation.

Digital platforms have diversified: some support community-based booking, local storytelling, and dynamic visitor guidance. Yet, dominant algorithms and social society still value and push viral content, meaning that even immersive offers are often packaged in simplified, shareable formats. Traveller intentions are evolving, but old booking habits and pricing incentives often pull them back into surface-level choices.

Operations and system infrastructure

Climate change has hit hard, especially for southern and coastal destinations. Insurance premiums, weather volatility, and biodiversity loss are escalating, particularly in unprepared regions. Without an EU framework, climate adaptation remains patchy, leaving many destinations overexposed. Polycrisis dynamics, pandemic aftershocks, energy insecurity, and cyber disruptions further fragment the system, which makes long-term planning difficult and deepens regional disparities.

Efforts to reduce emissions remain fragmented. High-impact transport modes persist, and without common carbon pricing, mobility incentives, or strategic mitigation planning, decarbonisation remains limited to isolated initiatives. In parallel, attempts to measure and use impact data remain fragmented. While some destinations experiment with ecological indicators or visitor sentiment tools, the lack of shared standards and interoperable systems limits widespread application. While some regions foster experimentation and co-creation, others lag behind or collapse under unmanaged mass tourism pressures.

Governance and society

Tourism policies remain localised and reactive, with minimal cross-border coordination. Without shared standards or regulation, innovation is scattered and exposed to instability and profit-driven tech corporations. Fragmented governance across Europe has led to stark disparities in investment, support, vulnerability, and resilience. While some regions foster experimentation and co-creation, others lag behind or collapse under unmanaged mass tourism pressures. Redistribution mechanisms for visibility, funding, and infrastructure investment are largely absent, reinforcing long-standing divides between high-profile destinations and less visible regions.

Threats and Opportunities

Threats

Without EU-level coordination, destinations face growing exposure to shocks. Climate volatility, insurance gaps, and energy insecurity hit hard, particularly in regions with weak governance.

Lacking common standards, even innovative areas struggle to scale or safeguard their gains. Creative tourism models such as co-creation, regenerative tourism, digital storytelling flourish in certain hotspots. Yet without policy frameworks or investment continuity, these models remain vulnerable to market shifts, local politics, and the absence of systemic support.

The rise of the global middle class fuels demand, but destination readiness is uneven. Some regions succeed in engaging these new travellers with participatory offers, while others are overwhelmed, reinforcing disparities in tech, benefits, capacity and capability.

Opportunities

Beyond major platforms, new community-based and open-source tools emerge, supporting local hosts and decentralised storytelling. These alternatives enable value-driven travellers to bypass legacy systems and seek deeper, more flexible travel formats.

Where visionary public or community leaders align with digital tools and citizen networks, tourism becomes a channel for local regeneration. These pockets of leadership enable bottom-up reinvention, resilient, culturally grounded and responsive to new forms of demand.

Travellers increasingly seek immersive, identity-affirming experiences. Despite old booking habits, younger and global middle-class segments push toward slower, values-driven formats, opening space for deeper cultural, ecological, and educational engagement where supply systems can adapt.

Four Scenarios: Table Overview

The table below summarises the key tourism system dynamics across all four scenarios. It provides a structured comparison of how demand, supply, infrastructure, governance, and societal response evolve under different future conditions. This overview supports quick reference and cross-scenario analysis.

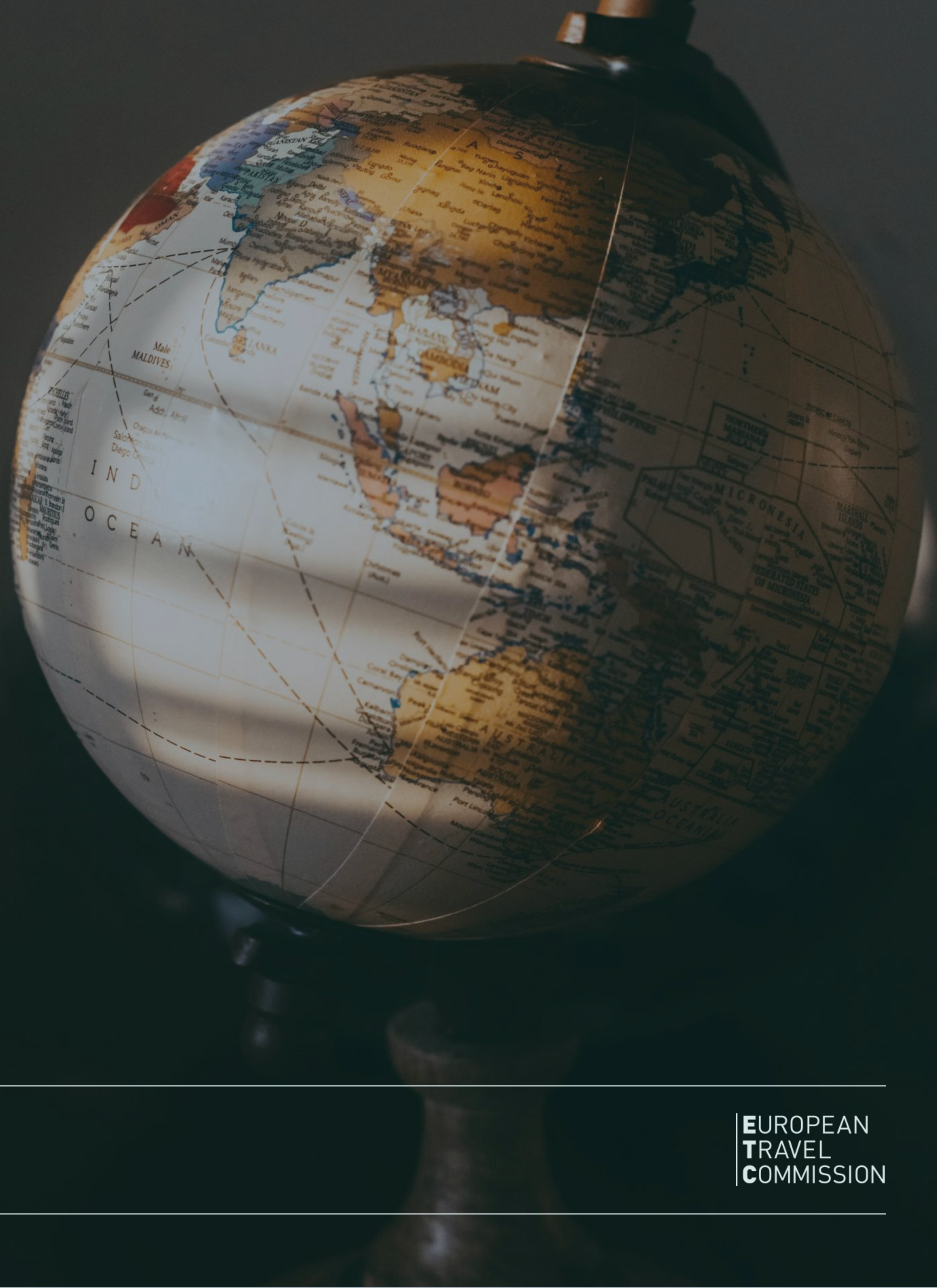
#	Category	Systemic Concept	Scenario 1: Fragmented and familiar	Scenario 2: Coordinated but unchanged	Scenario 3: Collaborative Transformation	Scenario 4: Uneven Transformation
Demand system ***Who travels, why, and how preferences change***						
1	**Values**	Global middle-class demand	Demand grows; Focused on iconic sites, straining systems.	Demand grows; Focused on iconic sites, better managed.	Demand grows; Channelled into diverse, long-stay and immersive travel offers.	Demand grows; absorbed unevenly.
2	**Values**	Value-driven travellers (Gen Z, Millennials)	Underserved; value-driven behaviour limited by cost, algorithmic defaults, lack of alternatives.	Underserved; acknowledged in policy but barely reflected in mainstream travel.	Actively co-create offerings; preferences drive innovation and participation.	Embraced by innovators; fragile and limited reach due to lack of structure.
3	**Travel Formats**	Long-stay, hybrid, and digital nomads	Not recognised anymore by the market; no large-scale adaptation	Marginal segment; tourism model remains short-term focused.	Supported with regulation, flexible policy, and co-living.	Emerges in adaptive destinations but remains ad hoc elsewhere.
Supply & Delivery system ***How is tourism offered and delivered?***						
4	**SMEs**	Role of SMEs	Marginalised by cost pressures and platform dependency.	Marginalised by cost pressures, supported institutionally, but sidelined in platform-driven demand flows.	Marginalised by cost pressures, central actors in innovation, immersive tourism, co-creation, and regeneration.	Marginalised by cost pressures, experiments with new forms of tourism, vulnerable due to lack of support and scaling power.
5	**Product Offer**	Tourism model and product development	Mass-market, iconic-site-driven, short-term focused.	Mass-market maintained, superficial sustainability offers.	Diverse, immersive, slow, place-based, and participatory offers dominate.	Diverse and creative, but unstructured and inconsistent.
6	**Cultural Authenticity**	Authenticity vs. commodification	Loss of meaning; experiences shaped for (cost) convenience.	Commodified and standardised for tourist expectations.	Co-created cultural narratives and community-driven experiences.	Differentiated: authentic in some places, performative in others.

7	**Innovation Capacity**	Local innovation	Fragmented, underfunded, low visibility, hard to scale.	Funded in niches, lacks connection to dominant travel flows.	Systemically supported, scaled, and aligned with broader system goals.	Funded in niches, innovative, but fragile due to fragmented support.
Operations & System infrastructure ***The systems that enable and/or constrain tourism performance***						
8	**Climate Adaptation**	Adaptation to climate risks	Reactive, underfunded and uneven; low level of adaptive capacity and resilience.	Addressed through policy; not embedded in products or destination DNA.	Addressed through policy, embedded in products and destination DNA.	Reactive, underfunded and uneven; low level of adaptive capacity and resilience.
9	**Climate Mitigation**	Emissions, carbon pricing, mobility	Not prioritised; high-impact modes persist.	Policy exists, sustainable mobility options are present, but supply logic and long-haul focus unchanged.	Policy exists, embedded in destination DNA, sustainable marketing and mobility options are popular.	Relies on bottom-up, behavioural change, lacks coordinated approach and transport transitions.
10	**Data**	Impact measurement and use	Lacking; data availability has increased but it remains underutilised, unstandardised and fragmented.	Data availability increased, mostly used for destination management and crowd control.	Systems redesigned to support value-aligned offers, local impact and equitable transparency.	Lacking; data availability has increased, new forms of impact data developed, but lack reach and coordination.
11	**Technological Platform Control**	Online visibility and demand control	Tech giants dominate; platforms steer mass flows, SMEs have minimal influence.	Online visibility shaped by commercial logic, policy response is present, yet large tech remains dominant.	Digital systems are redesigned with new public values, online visibility and transparency logic.	Used creatively in some regions; platform bypassing emerges; lack of reach and coordination
12	**Technological Infrastructure Support**	Smart tools, AI, and digital services	Used to optimise (cost) efficiency, and convenience.	Applied for system efficiency, not transformation.	Harnessed for co-creation, real-time experience design, and transparency.	Harnessed for co-creation, transparency and real-time experience in some areas. Remains fragile and hard to scale.
Governance & Society *How tourism is coordinated, regulated, and received by society*						
13	**Policy Context**	EU-level tourism governance	Low coordination; national silos dominate.	Strong coordination; but correlated demand is lacking.	Strong coordination; cross-sectoral collaboration enables adaptation and experimentation.	Low coordination; national silos dominate.

14	**Regulation & Equity**	Redistribution & system equity	Inequitable; major destinations dominate attention and resources.	Redistribution mechanisms exist but have limited behavioural effect.	Equity embedded in access, policy, investment, and design.	Regional divides deepen, despite local experimentation.
15	**Resident Impact**	Overtourism & social sentiment	Widespread protests; unmanaged growth fuels backlash.	Better managed via caps and controls, but resident voice still secondary.	Managed through co-design, regeneration, and balanced flows.	Mixed: deep participation in some places, tension in others.

Chapter 4

Persistent Systemic Conditions in European Tourism to 2035



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Persistent Systemic Conditions in European Travel to 2035

While each scenario explores a different path to 2035, a number of structural conditions appear across all futures. These recurring threats and opportunities offer critical insights into what is most vulnerable, most resistant to change, and most capable of transformation. They mark the contours of the future playing field and form the analytical bridge between scenario exploration and strategic recommendation.

Comparing the commonalities of the four scenarios helps us to envision the future playing field.

The table below outlines key structural threats that persist across all scenarios. These threats are not isolated disruptions, but enduring conditions that limit the tourism system's ability to evolve. They expose where resilience is lacking, where systemic imbalances are reinforced, and where the potential for transformation remains constrained:

Structural Threats

Structural threat	Covered by recommendation(s)
1. Weak structural position of SMEs Across all scenarios, SMEs struggle to compete within a system dominated by cost pressures, digital platforms, and fragmented support. Their limited capacity to comply with regulations or invest in innovation puts them at risk of decline, despite their importance to place identity and diversification.	IV. Empower SMEs; V. Support immersive SME offers; VII. Tech partnerships
2. Underutilisation of value-driven demand Younger travellers and other value-driven segments consistently express interest in sustainable and immersive travel, but the supply systems often fail to respond meaningfully. Behavioural gaps persist due to affordability constraints, limited online visibility of sustainable offers, and product scarcity.	V. Immersive offer support; VI. Impact transparency; VII. Tech alignment
3. Fragility of innovation ecosystems While local innovation appears in every future, it often lacks the structural support, funding, or online visibility needed to scale or persist. Many	IV. SME labs and support; V. Innovation grants; VIII. Futures literacy

initiatives remain isolated or short-lived, even when they align with broader sustainability goals.	
4. Insufficient climate adaptation Climate risks such as heat, drought, biodiversity loss, and insurance pressures threaten destinations across Europe. Yet the required adaptation actions remain unknown, reactive, patchy, or disconnected from tourism strategy and operational practice.	II. Reduce climate risk; III. Embed resilience into strategy; VI. Transparency indicators
5. Persistent inequities in access, distribution and ability Tourism benefits remain concentrated in well-connected and iconic destinations. Peripheral areas, underrepresented communities, and less visible SMEs and regions face barriers to participation, investment, exposure at a risk of financial and technological divide.	I. Foster collaboration; IV. System support in underserved regions; VI. Transparency
6. Dominance of platform and AI shaped demand In all scenarios, digital platforms, search algorithms, and viral imagery shape the majority of demand, often reinforcing volume- and price driven, convenience- first travel. Alternative or value-driven products struggle to gain online visibility, keeping consumer patterns locked in place despite changing traveller demand.	VII. Strategic tech partnerships; VI. Visitor-facing transparency tools; IV. Alternative platforms
7. Lack of impact transparency The effects of tourism on environment, economic leakage, equitability, and local benefit remain largely invisible to both policymakers and consumers. This hinders informed decisions, weakens accountability, and limits nudging potential for change.	VI. Develop interoperable indicators and visitor guidance; III. Carbon tracking
8. Geographic and structural imbalance in tourism benefits Tourism benefits remain disproportionately concentrated in well-connected, mainstreamed and iconic destinations. Peripheral regions and less-visible communities often lack the tools, data, or platform visibility needed to participate equally, reinforcing structural disparities despite various redistribution efforts.	I. Regional alignment and resource sharing; VI. Transparent benefit tracking
9. Cultural commodification and erosion of authenticity Tourism products are often shaped to meet visitor expectations rather than community narratives. This results in performative experiences, loss of meaning, and growing tension between tourism and identity in host destinations.	V. Support co-created community-based products; VI. Visibility of local contribution

Structural Opportunities

The table below outlines key structural opportunities that persist across all scenarios. These opportunities reveal recurring areas where momentum for positive change is visible or structurally feasible. The following opportunities point to leverage points within the tourism system: Spaces where innovation and alignment can generate disproportionate impact. Recognising these opportunities helps identify leverage points to futureproofing Europe's tourism:

Structural opportunity	Leveraged by recommendation(s)
1. Demand momentum from rising global middle class The continued expansion of the global middle class fuels inbound travel to Europe in all scenarios. This structural demand base creates a persistent opportunity to diversify markets, rebalance dependency on legacy visitor flows, and reframe Europe's global tourism position.	I. Market collaboration; III. Diversify strategy; VI. Inclusive value visibility
2. Generational shift towards value-driven travel Gen Z and Millennials increasingly seek travel aligned with sustainability, inclusion, and authenticity. Across all scenarios, this shift forms a long-term opportunity to strengthen immersive, meaningful, and regenerative offers; even if mainstream uptake remains slow in some futures.	V. Immersive offer development; VI. Transparency; VII. Platform filters
3. Bottom-up innovation and local creativity Each scenario reveals promising local experiments that are often driven by SMEs, DMOs, or cultural actors. Even in fragmented systems. This shows that place-based transformation is possible, especially when supported or scaled.	IV. Support infrastructure and labs; V. Fund pilots; VIII. Learning loops
4. Futures literacy as a strategic capacity While transitioning into directions of any of the 4 scenarios, the ability to sense weak signals, explore new futures, and update strategies accordingly is a cross-cutting capacity. It enables destinations and institutions to act early, adapt to uncertainty, and lead transformation.	VIII. Continuous monitoring and foresight cycles; I. Scenario review and re-anchoring
5. Expanding use of digital tools for public value AI, real-time data, and smart mobility systems appear across all scenarios, with growing potential to support impact-based decision-making, behaviour nudging, and personalised, value-driven experiences aligned with public value.	VI. Impact dashboards; VII. AI partnerships; III. Smart flow steering
6. Strength of immersive and community-rooted travel formats Immersive, participatory, and community-based tourism offers are recognised across scenarios as desirable and with high-potential. This applies particularly to spreading demand, supporting regeneration, equitability and enriching visitor-host relations.	V. Product development and branding; VI. Storytelling; I. Sharing models
7. Climate change preparedness as strategic advantage Destinations that act early to assess and reduce climate risk gain a long-term competitive edge. Climate disruption is a universal threat, but the ability to absorb shocks, protect quality of life, and maintain visitor appeal and affordability becomes a defining factor of future viability.	II. Reduce climate risk; III Embed resilience into strategy; VI Transparency indicators
8. Flexibility for experimentation in product offers Even in fragmented futures, many destinations retain flexibility to experiment with co-creation models, pricing innovations, immersive tourism, or regenerative formats. Destinations can act as “labs” for transition.	I. Cross-border pilots; V. Co-creation formats; IV. Innovation funding; VIII. Monitoring

Chapter 5

Recommendations and Strategic Actions for Future-Oriented Tourism in Europe

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Recommendations and Strategic Actions for Future-Oriented Tourism in Europe

The following set of recommendations is built on the principle of robustness, which means that they are cross-scenario recommendations. Rather than prescribing fixed actions for each specific future, they are designed to remain valuable under a wide range of conditions. In the face of growing uncertainty, fragmented governance, shifting demand, and intensifying climate risks, robust strategies offer the most practical foundation for long-term preparedness and adaptive capacity.

These recommendations do not depend on any single scenario becoming a reality. Instead, they reflect common structural challenges and opportunities that appear across all four futures. Their strength lies in their flexibility across scenarios, as they guide strategic actions for today while remaining relevant as the context evolves.

Below are 9 recommendations, each accompanied by a brief rationale outlining the structural challenges it addresses. Its relevance is then examined across all four scenarios to illustrate how the recommendation remains valid under different future conditions. Finally, a set of targeted strategic options is proposed to support the effective implementation of these recommendations by ETC (for overarching actions) and NTOs.

RECOMMENDATION 1:

Foster collaboration to bridge fragmentation gaps

Cross-border collaboration is essential for tackling tourism's systemic risks, with NTOs playing a key role through strategic alliances that drive shared impact even in weak governance contexts.

RECOMMENDATION 2:

Reduce climate risk at destination level

Climate disruption affects all European destinations, making proactive, locally tailored adaptation essential for resilient, future-proof tourism.

RECOMMENDATION 3:

Strengthen climate mitigation across tourism systems

Climate change is reshaping destination appeal, and those that proactively cut emissions and adapt—supported by ETC and NTOs—will stay competitive and aligned with future visitor and funding expectations.

RECOMMENDATION 4:

Empower SMEs through system development

SMEs are essential to European tourism but need strong systemic support to overcome growing challenges and remain resilient in a rapidly evolving landscape.

RECOMMENDATION 5:

Support SMEs in developing immersive, community and heritage-based offers

Immersive, community-based tourism led by SMEs offers inclusive, locally rooted experiences, but needs targeted support to scale and thrive within broader tourism systems

RECOMMENDATION 6:

Make local impact visible through innovative impact transparency

To support sustainable and equitable tourism, destinations need tools to measure and communicate local impacts, as transparency enables smarter decisions and aligns tourism with community benefit across all governance contexts.

RECOMMENDATION 7:

Engage strategic tech partnerships to shape online visibility and align offers with the values of new generations

Digital platforms heavily influence tourism visibility, so NTOs, DMOs, and public alliances must actively shape platform engagement to promote quality, sustainability, and local value over algorithm-driven volume and cost.

RECOMMENDATION 8:

Establish a futures lab to embed signal monitoring and strategic adaptation

To stay future-ready, tourism organisations need structured foresight—like a European futures lab—to anticipate change, build strategic capacity, and adapt proactively across all four scenarios.

RECOMMENDATION 9:

Strengthen system resilience through diversification of markets, mobility and tourism formats

Diversification strengthens tourism resilience by spreading visitor flows, reducing reliance on vulnerable markets, and supporting SMEs through varied formats, mobility options, and value-driven experiences.

I. Foster collaboration to bridge fragmentation gaps

Interregional and cross-destination collaboration becomes essential as systemic risks such as climate change, mass tourism, affordability gaps, and polycrisis dynamics do not respect national borders. Since these risks appear across all four scenarios, regardless of how governance evolves, collaboration remains a critical tool. In futures where EU-level tourism governance is weak or fragmented, it helps bridge regulatory, infrastructural, and knowledge gaps. In more coordinated futures, it enables differentiated implementation, joint learning, and shared capacity building. Collaboration creates space for alignment even in the absence of formal integration, making it a structurally robust response across contexts.

Even when NTOs cannot directly influence European legislation, they can lead by forming pragmatic cross-border alliances. These alliances enable joint lobbying, knowledge sharing, synchronised visitor caps, shared impact monitoring, and harmonised standards, allowing NTOs to act collectively, strategically, and with greater leverage.

The following strategic options are recommended for fostering collaboration to bridge fragmentation gaps:

1. Form regional clusters of destinations facing similar challenges, such as coastal climate risk, digital infrastructure gaps, or pressure from cruise tourism, to share solutions, tools, policy practices, and co-develop joint responses.

2. Coordinate joint lobbying efforts to advocate for shared frameworks around visitor fees, fair carbon pricing, and platform accountability. A united voice has greater policy influence.

3. Align visitor management tools and strategies, such as shared booking systems, capped access zones, or harmonised tourist taxes, to reduce fragmentation and improve traveller experience across borders.

4. Develop Policy Pilots that can be tested in selected destinations and replicated in others, to accelerate learning and build an evidence base for wider adoption.

5. Pool resources for shared investment in data systems, impact monitoring, destination marketing, and SME support infrastructure — especially in digitally underserved or financially constrained regions.

II. Reduce climate risk at destination level

Climate disruption is apparent, and while the intensity and visibility of these impacts vary across Europe, no destination is immune. What differs is the degree to which destinations are informed, resourced, and prepared to absorb and adapt to these changes. In futures with limited governance coordination, adaptation is reactive, fragmented, and uneven. In more coordinated contexts, it is embedded within broader policy frameworks but still depends on local knowledge, adaptive capacity, and targeted investments. Hence, regardless of their governance context, destinations need to know where they stand. Proactive, localised climate preparedness is a non-negotiable foundation for future-proof tourism.

The following strategic options are recommended to reduce climate risk at destination level:

1. Conduct climate risk scans at destination level, to identify key hazards (e.g., heat, drought, flooding, transition risks), exposure (e.g., water competition, exposed assets, tourism operating costs), and vulnerability (e.g., level of innovation, environmental performance, tourism density).

2. Map adaptive capacity by evaluating how well destinations are equipped to anticipate, respond to, and manage climate-related impacts in the tourism system.

3. Create climate readiness roadmaps to combine short-term measures (e.g. emergency planning, insurance coverage, water use policies) with long-term transformation (e.g. diversification, relocation, investment shifts).

4. Use risk insights to prioritise investments to guide where to strengthen infrastructure, adjust tourism offers, or introduce new policies such as heat-adaptive zoning or seasonal restructuring.

5. Embed climate data into visitor management systems to enable smarter crowd steering based on weather conditions, environmental thresholds, or transport reliability.

6. Advocate for the integration of tourism into local and regional climate adaptation plans to ensure the sector is not treated separately from infrastructure, health, or mobility policies.

Policy is robust if it is preparing for any future, and not for one or two specific scenarios.

III. Strengthen climate mitigation across tourism systems

Climate change is reshaping the fundamentals of destination appeal. Rising temperatures, weather extremes, and shifting seasonality are already affecting tourism flows, operational costs, and visitor expectations. As climate risks accelerate, destinations that act early to reduce emissions and adapt their offer will be better positioned to retain competitiveness, legitimacy, and access to funding.

Across all four scenarios, the tourism sector faces rising pressure to decarbonise. In futures with limited coordination, mitigation remains fragmented and reactive. In more structured futures, climate goals are present but often weakly translated into tourism strategies. Even where tourism is embedded in broader sustainability frameworks, implementation requires destination-level alignment and sector-specific guidance.

ETC and NTOs are well-placed to support this transition. They can help destinations translate ambition into action through shared standards, improved data, visibility for low-emission options, and guidance that works across governance contexts. Climate mitigation is not only a necessity, but it is a strategic opportunity for future-proofing European tourism.

Across all scenarios, destinations that integrate mitigation into their development choices are more likely to remain attractive, viable, and aligned with future funding streams and visitor expectations. ETC and NTOs can support this shift by enabling tourism actors to embed emissions reduction into strategic planning, promotional narratives, and long-term investment decisions.

The following strategic options are recommended to support climate mitigation across tourism systems:

1. Encourage sector-specific emission targets by supporting destinations to define tourism-related carbon budgets, linked where possible to national goals but feasible even where national alignment is lacking.

2. Support transparent emission tracking by helping destinations develop and adopt measurement methods for tourism emissions in transport, products, accommodation.

3. Advance low-emission mobility strategies by supporting rail visibility in marketing, promoting viable alternatives to air travel, and convening tourism and transport actors. NTOs can also coordinate research to inform policy and strengthen the case for investment in sustainable transport.

4. Align marketing strategies by encouraging destinations to reassess target markets, reduce emphasis on long-haul segments, and co-develop campaigns that promote rail-accessible, cross-border, and proximity travel within Europe.

5. Promote capacity-building by providing destination managers with practical guidance, toolkits, and scenario-based workshops focused on integrating climate risk and mitigation into tourism strategies.

6. Support market diversification by highlighting under-visited regions and off-peak periods in promotional efforts and encouraging public-private partnerships that develop and test alternative tourism products with lower emission profiles.

IV. Empower SMEs through system development

Small and medium-sized enterprises are the backbone of Europe's tourism offer, yet they are the most exposed to structural vulnerabilities. Rising operational costs, reduced customer spending, large tech dominance, and uneven access to data or infrastructure make it increasingly difficult for SMEs to remain competitive, hence even harder to innovate. Without focused support, SMEs risk becoming collateral damage in a fast-changing, climate vulnerable and tech-dominated tourism economy.

Across all scenarios, the role of SMEs proves critical, but their ability to thrive is shaped by the broader system around them. In futures with fragmented governance and dominant commercial platforms, SMEs face persistent online visibility challenges, limited access to data and tools, and few opportunities for experimentation. In more adaptive contexts, SMEs lead in shaping immersive and regenerative tourism, but their impact depends on access to smart infrastructure, collaborative networks, and long-term investment. And where innovation emerges from the ground up, progress often remains isolated and vulnerable, lacking the ability to scale.

Across all four scenarios, the role of SMEs is critical, but their ability to thrive varies widely. In futures marked by fragmented governance, SMEs face persistent visibility challenges, a widening digital divide, and limited access to the tools or funding needed for experimentation. In more coordinated futures, institutional support structures are in place, but many SMEs still struggle with the complexity of digital compliance, administrative requirements, and sustainability standards. In more adaptive and innovation-driven contexts, SMEs often lead in developing new tourism formats, but their impact remains fragile without stable investment, technical support, and connection to broader networks.

Supporting SMEs at the system level is essential to reduce dependency, enhance resilience, and create the enabling conditions for more balanced, locally anchored tourism development.

The following strategic options are recommended to empower SMEs through system development:

1. Facilitate SME access to product development tools, labs, and creative support networks by brokering partnerships with innovation hubs, universities, and cultural institutions. This enables SMEs to develop offers aligned with emerging demand, such as identity-based travel, immersive culture, eco-experiences, and wellness.

2. Establish regional support and development structures that help SMEs navigate digital compliance, develop product with state-of-the-art possibilities, participate in funding programs, and comply with sustainability requirements, especially in rural or under-resourced areas.

3. Reduce platform dependency by supporting the development and visibility of alternative distribution systems, shared marketing platforms, or open-source booking tools that prioritise value-driven products. This can be achieved by partnering with existing initiatives and advocating for digital ecosystems that are more inclusive of SMEs and community-based tourism.

4. Connect SMEs with real-time data to enable them to understand visitor flows, adapt pricing, monitor performance, and align offers with demand while remaining competitive with tech and data driven 'giants'.

5. Embed SMEs into destination governance not as stakeholders to be consulted but as co-designers of future strategies, particularly in areas linked to local storytelling, regeneration, and visitor experience design.

6. Promote cross-border SME exchange programs to stimulate businesses in different regions to learn from each other, test scalable models, and avoid duplication of efforts.

V. Support SMEs in developing immersive, community and heritage-based offers

Immersive, community-anchored tourism is increasingly recognised for its potential to support inclusive, place-based, and culturally meaningful development. These forms of tourism deepen the relationship between visitors and local communities, reinforce identity, and help distribute value more equitably across the tourism system. However, despite the growing demand among younger and values-driven travellers, such experiences remain underdeveloped, fragmented, and difficult to scale.

Most of these offers are initiated by small enterprises, cultural actors, or local networks with limited access to capital, time, and online visibility. Unlike standardised tourism products, immersive experiences rely on co-creation, narrative development, and interdisciplinary co-creation. They cannot be designed, replicated or mass-produced. Without targeted support, their full potential can remain underutilised, especially in a system shaped by price, convenience, reach, and volume.

Across all scenarios, immersive experiences either struggle to gain traction, emerge in isolated pockets, or receive strategic investment and visibility depending on broader governance and market conditions. In more fragmented futures, they remain marginalised by platform logic and resource constraints. In more coordinated or adaptive contexts, their development becomes integral to wider destination strategies. Yet even where they flourish, long-term viability depends on visibility, support infrastructure, and systemic integration.

Because SMEs are closely tied to place identity, cultural expression, and local value creation, their ability to adapt and evolve will significantly influence whether tourism development becomes more balanced or more commodified. Systemic support is therefore essential to strengthen their resilience and unlock their potential as agents of change. Support for immersive tourism requires product-level focus: investment in experimentation, storytelling, positioning, and value communication. Strategic integration into the wider tourism offer is needed for these formats to succeed and scale.

The following strategic options are recommended to support SMEs in developing immersive, community and heritage-based offers:

1. Launch targeted funding schemes and innovation grants to support SMEs, cultural institutions, and communities in designing, testing, and refining immersive tourism products that reflect local culture, ecology, or identity.

2. Coordinate multi-destination pilot programmes to support interdisciplinary collaboration in testing different models of immersive tourism. These may include co-creation projects such as immersive heritage experiences, community-based initiatives, and narrative-driven itineraries, aimed at identifying what resonates with visitors and what development conditions are needed for success.

3. Establish a European learning and mentoring network where early adopters, cultural entrepreneurs, destinations, and community-tourism pioneers can share insights, review each other's offers, and co-develop quality and authenticity standards.

4. Develop prototype offers in collaboration with local creatives and SMEs, focusing on authentic cultural and community experiences. National or local DMOs should support these prototypes through branding campaigns that position immersive tourism as a modern, desirable, and a socially valuable part of the tourism landscape.

5. Integrate immersive product development into long-term destination strategy moving it beyond seasonal or niche treatment, with dedicated visibility, positioning, and access to mainstream markets.

6. Use impact transparency (see Rec. VI) to show how immersive tourism contributes to local value, reinforcing its appeal among value-driven travellers and strengthening the business case for SMEs and DMOs.

VI. Make local impact visible through innovative impact transparency

To shift tourism toward greater sustainability, equity, and community benefit, destinations need better ways to make the impacts of tourism visible. Just as eco-labels or nutrition scores guide consumer choices in other sectors, tourism needs tools that make visible the carbon footprint of activities, the share of spending that stays local, and whether businesses are community-owned or socially responsible.

Today, however, many destinations lack the capacity to measure where tourism revenues go, how much carbon is emitted per activity or accommodation, or how different business models contribute to or extract from local value chains. This invisibility makes it difficult for policymakers to target interventions, for SMEs to differentiate themselves, and for visitors to align choices with their values.

Across all scenarios, the role of local impact transparency varies significantly. In less coordinated futures, data remains fragmented, underutilised, or focused only on managing visitor volumes. Without common standards or incentives, destinations will still struggle to measure what matters. While in more adaptive and integrated systems, impact transparency is actively used to steer tourism development, guiding investment toward locally beneficial initiatives, shaping policy decisions, and nudging visitors make more informed and responsible choices. In these contexts, transparency acts as a feedback loop that connects visitor behaviour, destination strategy, and community benefit.

The following strategic options are recommended to strengthen local impact transparency in tourism systems:

1. Define and test a core set of meaningful indicators for tourism at the product, enterprise, and destination level, including carbon footprint, local economic retention, community participation, and profit distribution.

2. Help NTOs establish cross-level governance coalitions with municipalities, provinces, DMOs, and national ministries to co-invest in interoperable data systems, joint research, and common standards for impact measurement.

3. Coordinate a joint research and pilot program with selected destinations and academic partners to explore feasible impact indicators (e.g. economic leakage, local retention, cultural impact) and test their relevance for different types of tourism products and visitor segments.

4. Design visitor-facing prompts, booking filters, and visual labels that help travellers identify experiences and providers aligned with local benefit and sustainability.

5. Engage platforms and major industry players through structured dialogue to explore voluntary integration of impact indicators into booking interfaces (e.g. filters for “local benefit,” “low carbon,” or “community-owned”), with NTOs acting as conveners and credibility brokers rather than regulators.

6. Work toward a common impact signalling system (e.g. a simple visual mark or label category) that is not a strict certification but a soft standard. Something destinations and SMEs can adopt voluntarily but reflects a collective alignment.

7. Develop guiding principles for ‘responsible online visibility’ that can be used by destinations and platforms to communicate tourism impacts transparently but credibly, even in the absence of hard data. This helps set behavioural expectations without overpromising precision.

8. Support research on visitor response to impact communication to better understand how different audiences interpret and react to transparency signals (e.g., local contribution, carbon intensity, or community ownership). Assess which formats are most effective.

VII. Engage strategic tech partnerships to shape online visibility and align offers with the values of new generations

Digital platforms increasingly shape what travellers see, choose, and ultimately experience. From booking engines to content aggregators and AI-driven trip planning tools, these systems influence which offers become visible, bookable, and competitive. Yet their algorithms, default search structures, and commercial logics often prioritise volume, convenience, and low cost which can undermine efforts of destinations, SMEs, and policymakers to promote more meaningful, inclusive, or sustainable forms of tourism.

Across all scenarios, the digital layer of tourism plays a defining role in shaping demand and product development. In fragmented futures, public actors lack the leverage or coordination to influence platform logic. In more coordinated or adaptive settings, visibility ecosystems are actively co-shaped by public and private actors to align with broader goals. Without deliberate engagement, tourism’s future risks being governed by algorithmic default and big tech sorting mechanisms.

Waiting for regulation or market-led change is risky and too reactive. Instead, NTOs, DMOs, and public tourism alliances should position themselves as strategic partners that work with platforms to support sustainable product visibility and embed signals of quality, impact, and local contribution. This is not about replacing commercial logic, but about expanding what becomes discoverable, desirable, and legitimised in digital space.

The following strategic options are recommended to engage tech platforms and shape online visibility in line with public value:

1. Initiate strategic dialogues with major platforms and OTAs to explore ways of incorporating basic online visibility signals for locally-owned, community-based, low-impact or SME-led offers.

2. Collaborate with platform and AI developers to influence how automated trip planning and recommendation engines define relevance. Advocate for the inclusion of local impact, ownership structure, carbon intensity, and community value as part of the training data and scoring logic behind AI-generated tourism suggestions.

3. Prepare for AI-based discovery by developing content, metadata, and digital structures that promote local value in machine-readable ways. Just as SEO shaped web visibility, destinations and tourism actors should begin aligning their digital content with the kinds of signals AI systems will rely on.

4. Pilot regional partnerships with platforms to test how search results, filters, or ranking logic could be adjusted to reflect alignment with public value such as local benefit, seasonality management, or cultural immersion.

5. Support experimentation with hybrid online visibility models where public platforms (e.g. DMO websites) and commercial engines interconnect to improve discoverability of underrepresented, value-based products.

6. Collaborate with innovation units or tech accelerators to ensure that emerging product formats (e.g. AI-curated trips, digital twins, immersive planning tools) are tested with input from SMEs, sustainability experts, and regional actors.

7. Create guiding principles for 'responsible discoverability' and use them to influence early-stage platform design, helping ensure that the tourism of the future is not just frictionless but fair, inclusive, and aligned with long-term goals.

VIII. Establish a futures lab to embed signal monitoring and strategic adaptation

To remain future-fit, tourism organisations must go beyond reacting to trends. They need structured ways to detect early signals of change, interpret shifting dynamics, and adjust strategies as conditions evolve. A futures lab at the European level creates the institutional space for this work as a recurring forum where strategic thinking, horizon scanning, and scenario sense-making come together.

Across all scenarios, institutional sensitivity to change constitutes a long-term strategic asset. In fragmented policy environments, the absence of structured foresight increases the risk of strategic drift as developments outpace response capacity. In more adaptive settings, the systematic monitoring of signals and regular reflection processes enable organisations to build anticipatory capacity and maintain strategic coherence under evolving conditions.

A futures lab provides a structured mechanism to engage with uncertainty; not only to anticipate disruption, but also to identify emerging opportunities. It facilitates iterative learning, supports continuous experimentation, and helps integrate future-oriented thinking into the organisation's core planning and decision-making processes. Such a lab helps tourism actors internalise futures literacy, revisit assumptions, and strengthen their ability to act before change becomes urgent. It reinforces the move from short-term problem-solving towards longer-term strategic shaping.

The following strategic options are recommended to support the development of a futures lab:

1. Establish a recurring futures lab cycle aligned with organisational planning and decision-making processes, enabling regular review of developments, scenario relevance, and potential strategic adjustments.

2. Integrate structured horizon scanning into institutional intelligence workflows by applying a common framework to assess signals across thematic areas, scenario axes, and long-term priorities.

3. Support the futures lab with a small intelligence team responsible for curating signals, translating insights into strategic implications, and supporting futures lab sessions across departments.

4. Formalise collaboration between internal units, DMOs, research partners, and external experts to broaden the evidence base, ensure interpretative diversity, and improve system-wide awareness of emerging change.

5. Institutionalise periodic reflection moments such as annual foresight reviews or mid-cycle scenario updates to assess strategic assumptions, adjust orientations, and strengthen alignment with evolving system conditions.

IX. Strengthen system resilience through diversification of markets, mobility and tourism formats

In more coordinated and adaptive futures, diversification is not just a buffer, but it becomes a mechanism for shaping a more balanced and future-fit tourism system. It enables spatial and temporal distribution of flows, supports locally anchored development, and allows regions to align their offers with new generational values. Rather than being a promotional strategy, diversification becomes a structural design choice for increasing adaptability and long-term resilience.

Across all scenarios, diversification remains a structurally sound strategy. In fragmented or unstable futures, dependence on long-haul markets, aviation-heavy access, or mass-tourism formats creates exposure to disruption. Broadening the visitor mix by strengthening regional and proximity markets, accounting for demographic shifts, and addressing generational differences in travel values reduces that risk. Destinations that serve both ageing travellers and younger, purpose-driven segments are better equipped to adapt as global demand patterns evolve.

Mobility diversification is essential for resilience. Destinations that depend heavily on aviation or high-impact transportations are more exposed to fuel price volatility, regulatory shifts, boycotts or sudden travel restrictions. Expanding rail access, enabling cross-border regional travel, and investing in low-emission transport options reduces that exposure and supports broader sustainability goals. For many regions, this also means designing offers that are accessible without flying.

Diversifying tourism formats helps destinations move beyond peak-season, high-density models. By supporting wellness, educational, nature-based, and community-led experiences, destinations can create year-round demand, establish alternatives to hotspots, and allow places to express local identity. In climate-sensitive regions, this may require phasing out vulnerable formats or rethinking experiences to remain viable under new environmental conditions.

The following strategic options are recommended to strengthen tourism system resilience through diversification:

1. Coordinate national visitor mix strategies that reduce dependence on long-haul markets by strengthening proximity travel, activating diaspora connections, and addressing generational and demographic shifts in travel preferences.

2. Develop visitor mix strategies that target proximity and regional markets, engage diaspora communities, and respond to generational and demographic shifts in travel behaviour.

3. Promote year-round tourism through seasonal product development, adaptive pricing strategies, and coordinated off-season marketing.

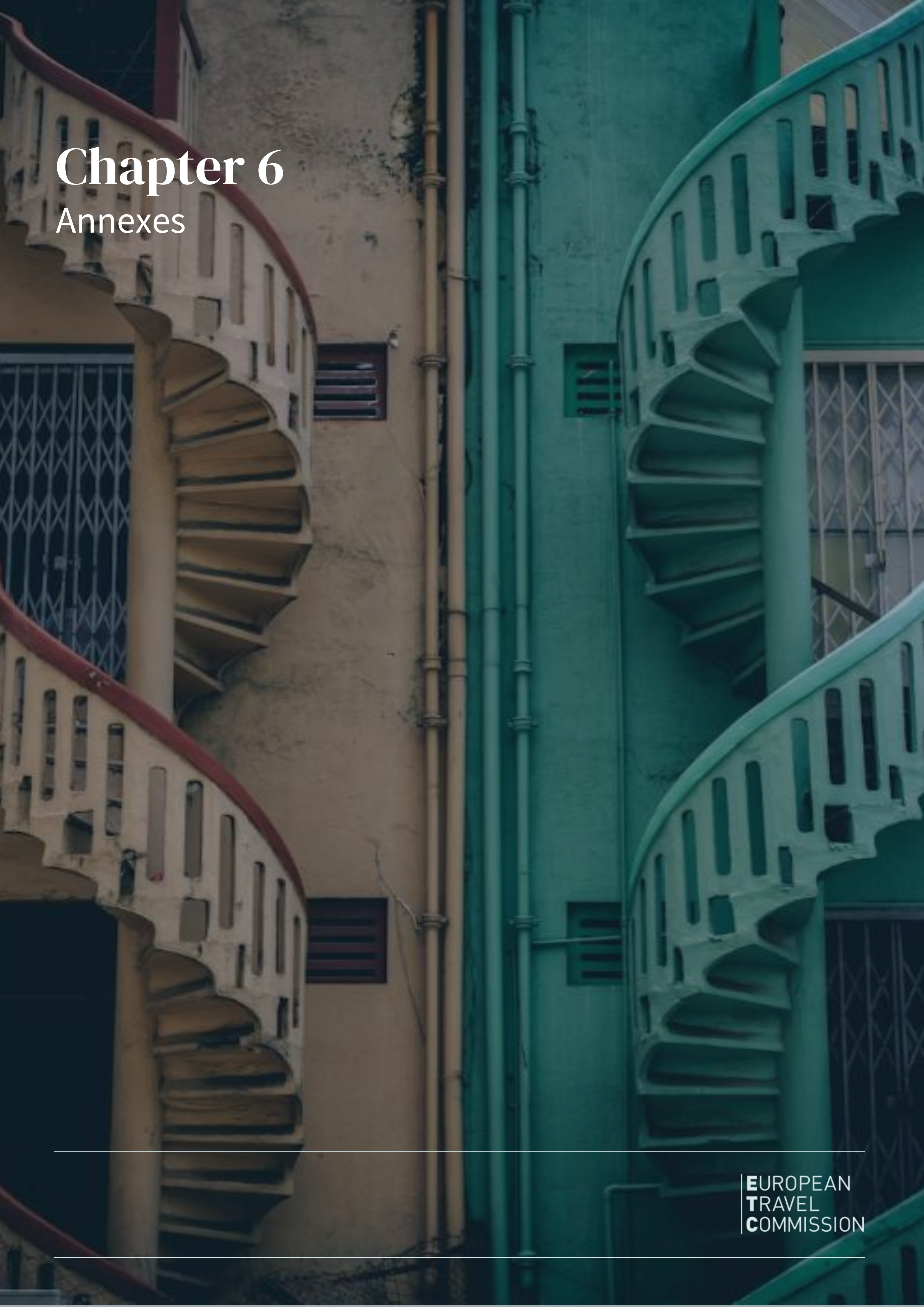
4. Strengthen modal diversification by investing in rail-accessible tourism, regional cross-border mobility, and low-emission transport connections to reduce reliance on short-haul air travel.

5. Support tourism format innovation by enabling wellness, educational, nature-based, and community-led offers, particularly in underrepresented or climate-sensitive regions.

6. Integrate diversification into national and regional strategy through scenario-informed planning, using market intelligence to anticipate dependency risks and identify emerging opportunities.

Chapter 6

Annexes



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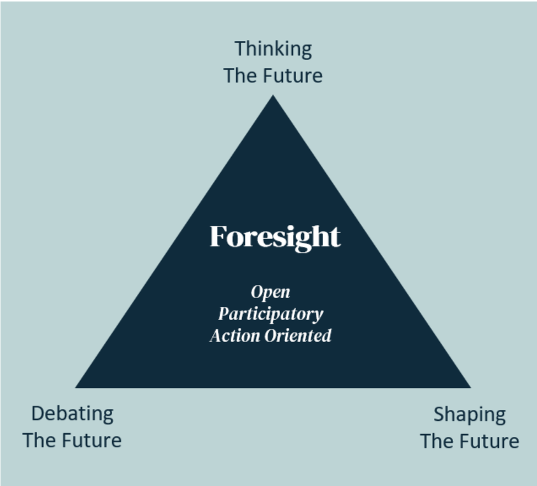
Annex 1 - Methodology description

A challenging forcefield

Today's society is complex, dynamic and rather unpredictable in its development. These characteristics have to do with the transition that society is currently going through, on the one hand, and on the other hand with numerous forces that play a role, for example in the technological, demographic, economic, social and political fields. Nationally, but also in Europe and beyond. If National Tourism Organisations want to be able to continue to occupy a relevant position in the future, the complex and dynamic force field forces them to look at that world in a different way and to relate to it in a different way. This requires resilience and adaptivity, which can be promoted with the help of *foresight*. If foresight is used to inform strategy development, it is referred to as *strategic foresight*. The ETFI published a book about scenario planning and its approach in December 2024[1] .

Foresight

Foresight is a competence. It is defined as "*the ability to take a forward view that enables action to be taken with reference to, and within the context of, the future".* A key aspect of ETFI's approach is to work collaboratively. In line with the European Foresight Platform the ETFI perceives foresight as an open, participatory and action-oriented process in which the participants jointly map, discuss and shape their future. In practice this means that much time is dedicated to workshops with stakeholders and/or experts (see image below). Strategic foresight links foresight to strategy development.



(source: European Foresight Platform)

Scenarios

Explorative scenarios provide a key tool in (strategic) foresight. These are used to explore the future, not to predict it. The scenarios paint alternative futures, mostly as combinations of words and images to appeal to both halves of the brain. They are framed by driving forces that are perceived to have a strong impact and at the same time a high level of unpredictability – the so-called key uncertainties. The scenarios depict (four) plausible distant futures, in which different important anticipated developments in society are integrated. While there is little chance that an individual scenario will eventually manifest itself (as they are not intended to be predictions), there is a very good chance that what will actually happen in the future will be framed by the four scenarios and will contain elements thereof. In fact, the scenarios can be perceived as the corners of a billiard table that together delimit the future playing field that the NTOs will encounter. In this way, the scenarios provide guidance to design strategies or policies that can prepare the NTOs for what is to come, in order to become more future-proof, but also to steer developments in a more desirable direction.

In most cases, the explorative scenarios focus on the uncertainties in the macro environment and meso environment. In the macro-environment, regional, national and international developments take place in demographic, economic, social/cultural, technological, ecological and (geo)political domains, usually with a life span of 10-15 years or more. These developments are superimposed to the NTOs without being able to influence them. Meso-developments take place in the domain of tourism, such as in supply and demand[2]. NTOs can exert (some) influence on these developments. See the image below.

The scenarios presented in this report are underpinned by detailed analyses and data, which are substantiated in a separate document titled *Future Proofing European Tourism through Scenario Planning and Strategic Foresight – Annex 2*. This companion report provides the research foundation and rationale behind the scenario development.

Approach

During a workshop at the European Travel Commission headquarters, a multidisciplinary expert group was facilitated to collaboratively work on the ingredients required to develop exploratory scenarios. To prepare for the workshop all participants were requested to identify salient developments, trends, emerging issues, etc that could have an impact on the future of tourism to and within Europe (horizon scanning) during the next ten years. The outcomes formed the input for a process, in which each step was taken collaboratively. The participants started with discussing the observations in groups and integrating them into a listing of key developments in the environment impacting upon tourism to and within Europe. These environmental developments were analysed and grouped into clusters based on presumed cause-and effect relations, with each cluster representing a process driving the future of tourism to and within Europe. Each cluster was given a label according to the presumed driving force of change fuelling the process. The driving forces (and the processes that they drive) were ranked according to the perceived level of impact and the perceived level of unpredictability/uncertainty.

The scoring exercise resulted in a few drivers that could be considered 'givens' (drivers of change pairing a relatively high impact to a relatively high level of predictability / certainty) and a few key uncertainties (drivers of change pairing a relatively high impact to a relatively high level of unpredictability / uncertainty). Both the givens and the key uncertainties were reviewed by the participants concerning their potential impact on tourism to and within Europe. All the outcomes of the workshop have been processed by the European Tourism Futures Institute to develop scenarios for 2035. Finally, strategic options have been formulated to address the potential futures described in the scenarios and to inform NTOs in making informed decisions.

Driving forces of change

Two weeks before the workshop the participants received a template in which they were asked to register all kinds of developments, trends, emerging issues, uncertainties etc. in the 'business environment'. During the workshop the participants discussed their own findings in small groups to identify the most essential observations. The findings in the groups were collected and plenary these observations were grouped according to cause and affect relationships. Each cluster was given a label referring to the presumed force that drives each process. The contents of the clusters were processed into a narrative describing the process directed by the driving force.

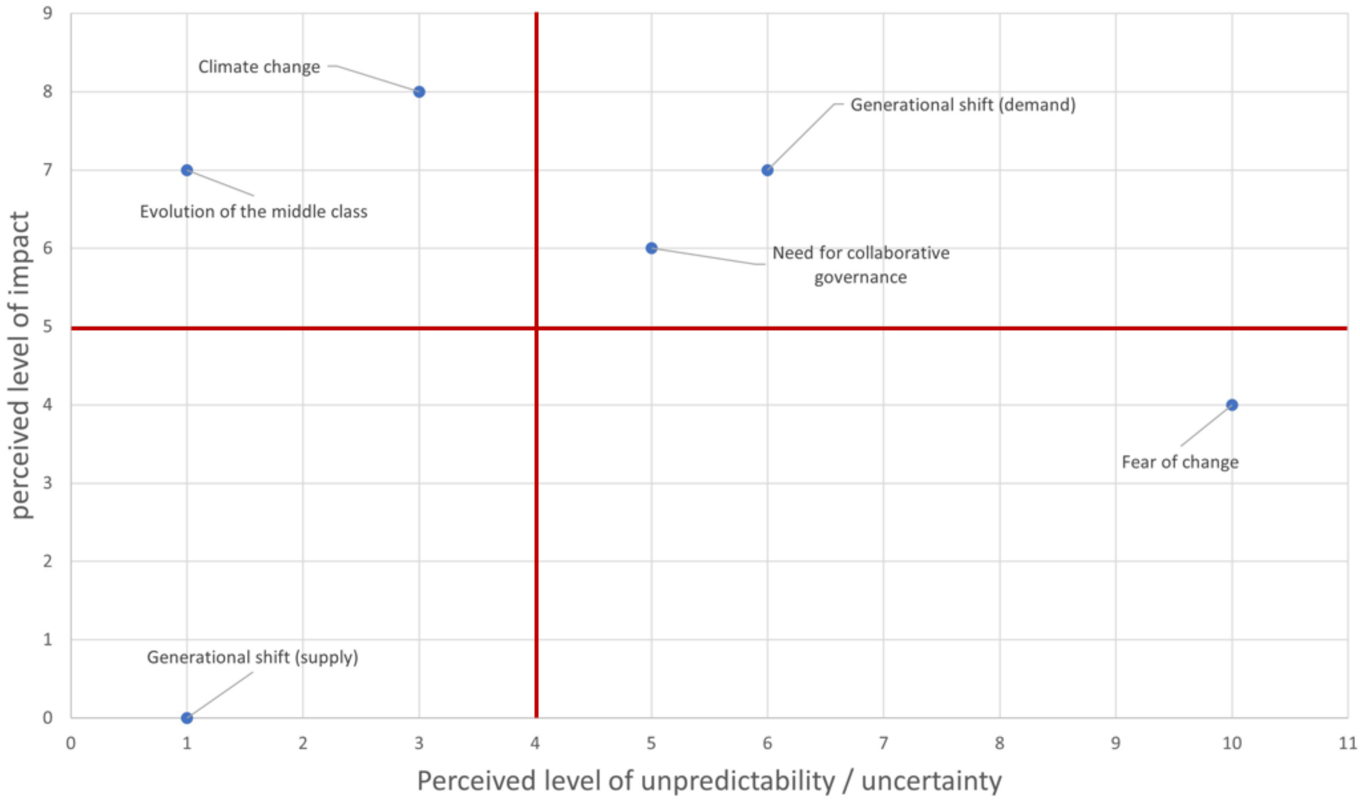
Driver prioritisation

While each of the above drivers may influence the future of tourism, not all are equally uncertain or equally impactful. To build scenarios that prepare for the most impactful and uncertain, a distinction is made between two types of drivers:

- **Givens**: high impact and relatively low uncertainty. They form the stable backdrop against which different futures unfold.
- **Key uncertainties**: high impact and very unpredictable. These serve as the foundation for scenario development, as their future direction remains open, i.e. the driving forces of change that both have a high level of impact and a high level of uncertainty with regard to the ten years to come.

The prioritisation of the drivers is visualised in the impact-uncertainty matrix below. The lower half of the matrix contains drivers with relatively less influence than the ones in the upper half. In the upper half, the left quadrant shows the **givens,** while the upper right quadrant presents **key uncertainties.**

According to this expert-based prioritisation the givens are: climate change and evolution of the global middle class. While the key uncertainties are: the generational shift in tourism demand and the need for collaborative governance and regulation at the European level.



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All four of the top-priority drivers (the two givens and two key uncertainties) will be further elaborated in the following chapter. The **givens** will be included in every scenario, forming a consistent baseline. The **key uncertainties** will be explored through contrasting outcomes, which will be used to construct four distinct future scenarios. This prepares the ground for the next phase of the process: describing the critical drivers in depth, and outlining the extremes that define the scenario logic.

Annex 2 – Justification

The scenarios presented in this report are underpinned by detailed analyses and data, which are substantiated in a separate document titled *Future Proofing European Tourism through Scenario Planning and Strategic Foresight – Annex 2*. This companion report provides the research foundation and rationale behind the scenario development.

European Travel Commission

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