

# Tourism Data Space

Event 9 JUNE 2022

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# Welcome & Opening



Francesco Bonfiglio  
Chief Executive Officer  
Gaia-X





# Event Keynote Opening (Recording)



Carme Artigas Brugal  
Secretary of State for Digitalisation and AI  
National Ministry of Economic Affairs and Digital Transformation



# European Commission perspective on a Tourism Data Ecosystem to accelerate the economy



Yvo Volman  
Director for Data  
DG CNECT





# Keynote: Tourism innovation ecosystem (Recording)



Natalia Bayona

Director Innovation, Education, and Investments

UN World Tourism Organization



# The European Regional Practice for Competitive and Sustainable Tourism.



Ms Ana Moniche Bermejo

Senior Analyst

Turismo Andaluz and NECSTouR Tourism of Tomorrow Lab

Cristina Núñez

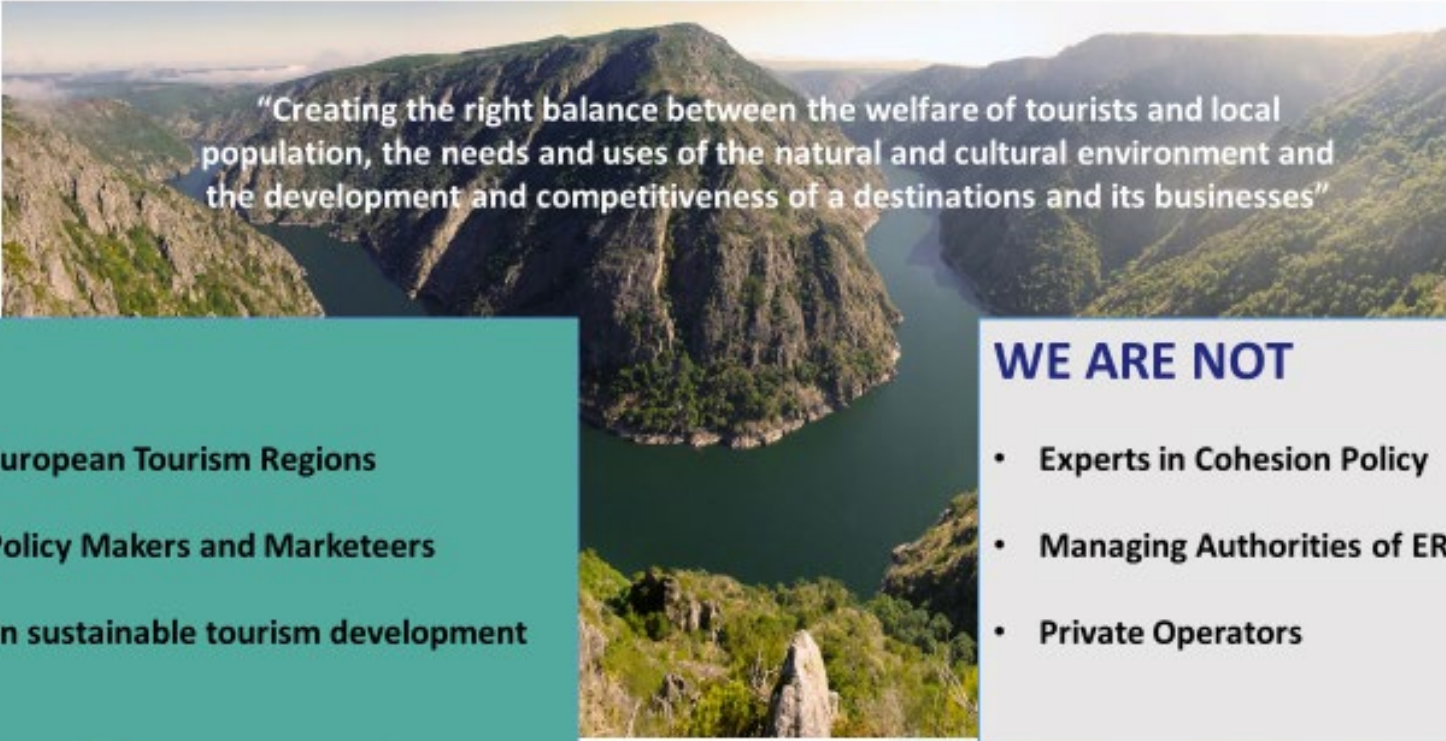
Director

Necstour



# Who we are and what we do

## NECSTouR MISSION



“Creating the right balance between the welfare of tourists and local population, the needs and uses of the natural and cultural environment and the development and competitiveness of a destinations and its businesses”

### WE ARE

- Leading European Tourism Regions
- Tourism Policy Makers and Marketeers
- Engaged in sustainable tourism development

### WE ARE NOT

- Experts in Cohesion Policy
- Managing Authorities of ERDF
- Private Operators



# Leading Regions to measure success differently

**40 REGIONAL AUTHORITIES**

*(NUTS I, II and III)*

**21 COUNTRIES**

**10**

**ASSOCIATED**

*Representatives of Tourism business  
associations and networks*



**1 SINGLE  
STRONG  
VOICE**

**20 ACADEMICS**

*Universities and Research*

# Data is a key driver to build resilience

## Supporting our Members in building a better recovery



**Belgium and Flanders announce measures to give oxygen to the tourism sector in face of COVID-19 crisis**

The Belgian authorities in government have called on tourism and cultural sector partners to follow the Government health guidelines, including measures to support the tourism sector, including the tourism sector.



**Catalan Tourism Board's information and operational strategies towards COVID-19 recovery**

The Catalan Tourism Board's information and operational strategies towards COVID-19 recovery.



**Liguria Region supports its tourism operators during COVID-19 outbreak**

Liguria Region supports its tourism operators during COVID-19 outbreak.



**Wallonia Measures on Covid-19**

The Walloon Region has taken measures to support the tourism sector, including the tourism sector.



**Wallonia Measures on Covid-19**

The Walloon Region has taken measures to support the tourism sector, including the tourism sector.



**COVID-19: A guide for travellers to Lombardy Region**

COVID-19: A guide for travellers to Lombardy Region.



**COVID-19 measures taken in Genoa to support the tourism sector**

COVID-19 measures taken in Genoa to support the tourism sector.



**Tuscany Region is setting up a Crisis Management Team for Tourism**

Tuscany Region is setting up a Crisis Management Team for Tourism.



**Wales' response to COVID-19**

Wales' response to COVID-19.



**Turkey's Region Act on Plan against COVID-19 effects**

Turkey's Region Act on Plan against COVID-19 effects.



**Andalus: A guide for travellers to Andalus**

Andalus: A guide for travellers to Andalus.



**Tourism Industry Forum (TIF) 2020**

Tourism Industry Forum (TIF) 2020.

### Five 'S' for the Sustainable Tourism of Tomorrow



SMART DESTINATIONS

SOCIOCULTURAL BALANCE

SKILLS AND TALENT

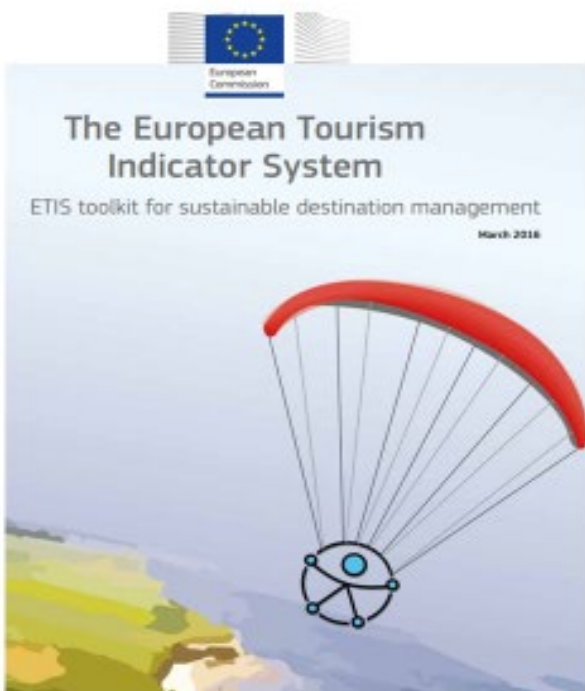
SAFETY AND RESILIENCE

STATISTICS AND MEASURABILITY



NECSTouR

# We cannot manage what we cannot measure



**MITOMED: Models of Integrated Tourism in the MEDiterranean**



**DIGITALISATION  
AND SAFETY  
FOR TOURISM**



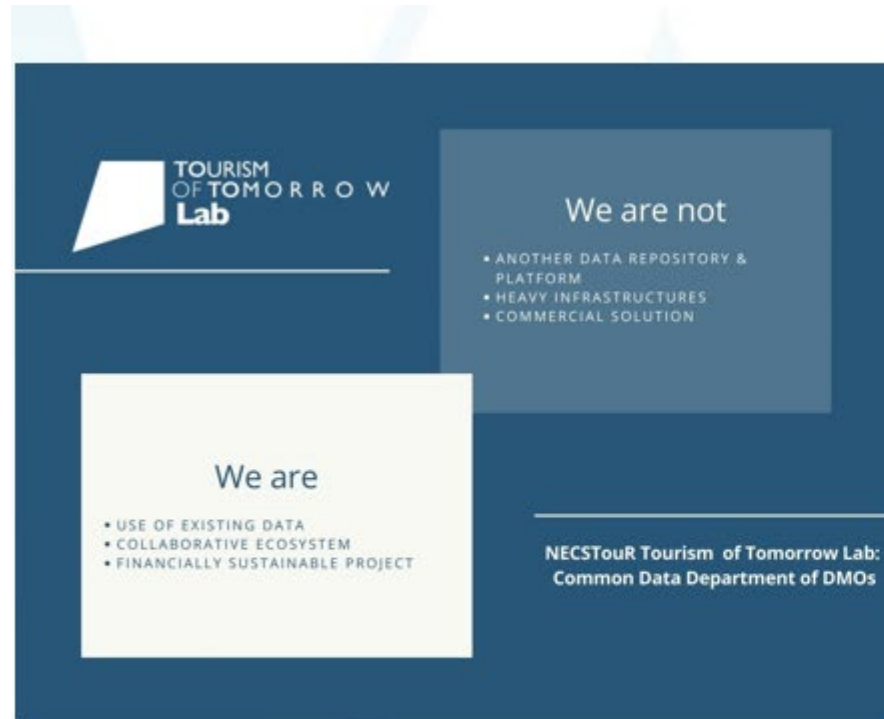
**NECSTouR**









# European Data Space's purpose for destinations

- 1** Predictive data is vital for destinations & businesses decision: customer behaviour, bookings, benchmark, response
- 2** Each source of data own features: mobile, credit card, booking platforms, GDS, Google analytics, review website
- 3** Combination of traditional and non-traditional sources multiplies value of insights
- 4** Respect of data protection regulation, privacy and ethics

# Delivering cases of use through ToT Lab



ToT Lab: Freemium-based Services		
	Basic (for all the NECSTouR Members)	Premium (ToT Lab Premium Fee)
 Market Trends	✓	✓
 Observatory	✓	✓
 Newsletter	✓	✓
 Workshops		✓
 Consulting Services		✓
 Connect to Lab		✓

NECSTouR

# Why regions are interested in a Tourism Data Space

- An efficient, transparent and fair data market
- Seamless tourism experience
- Integration of diverse data sources



# An efficient, transparent and fair data market

- More exchange and use of data
- Setting common goals
- Privacy of tourists: code of conduct
- Incentives for data players to act
- Fair competition
- Reduce the gap between small and big players and DMOs

- Travel and mobility
- Interoperability of whole tourism value chain
- Presentation of tourism assets to the demand

- Fragmentation of data: a challenge for DMOs
- Policy decisions need clear definitions and methodologies:
  - Coherence with official statistics
  - Access to meaningful data
  - Integration with other sectors key for sustainability



# Why Gaia-X is needed?



Normalisation

Interoperability and quality of data

overcome existent obstacles for a more  
extensive use of data

  
Thank you!

Contact

# Spanish National hub of Gaia-X



Dolores Ordóñez  
Technical Director, AnySolution  
Vice-president, Spanish National Hub Gaia-X

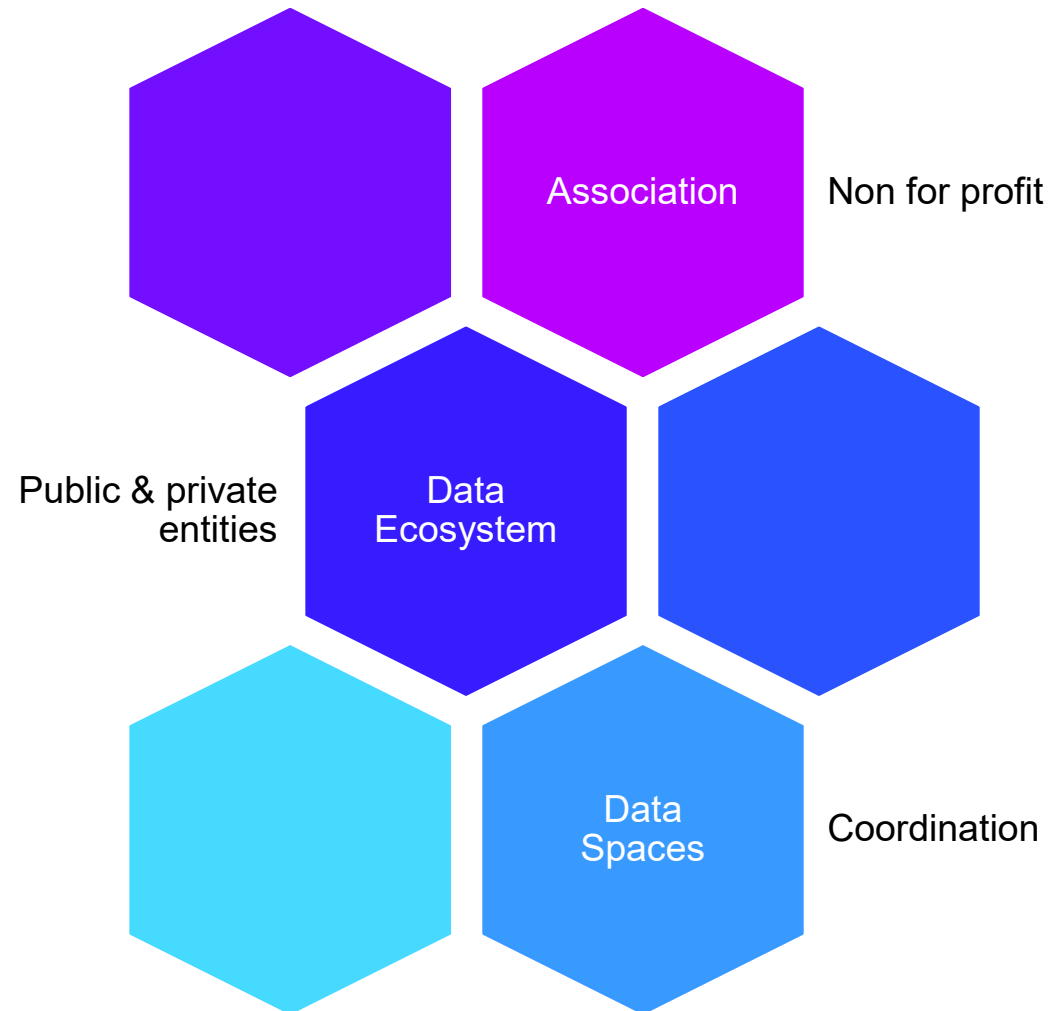


# Spanish National Hub of Gaia-X



Talavera de la Reina, 18/03/2022

# Spanish National Hub of Gaia-X

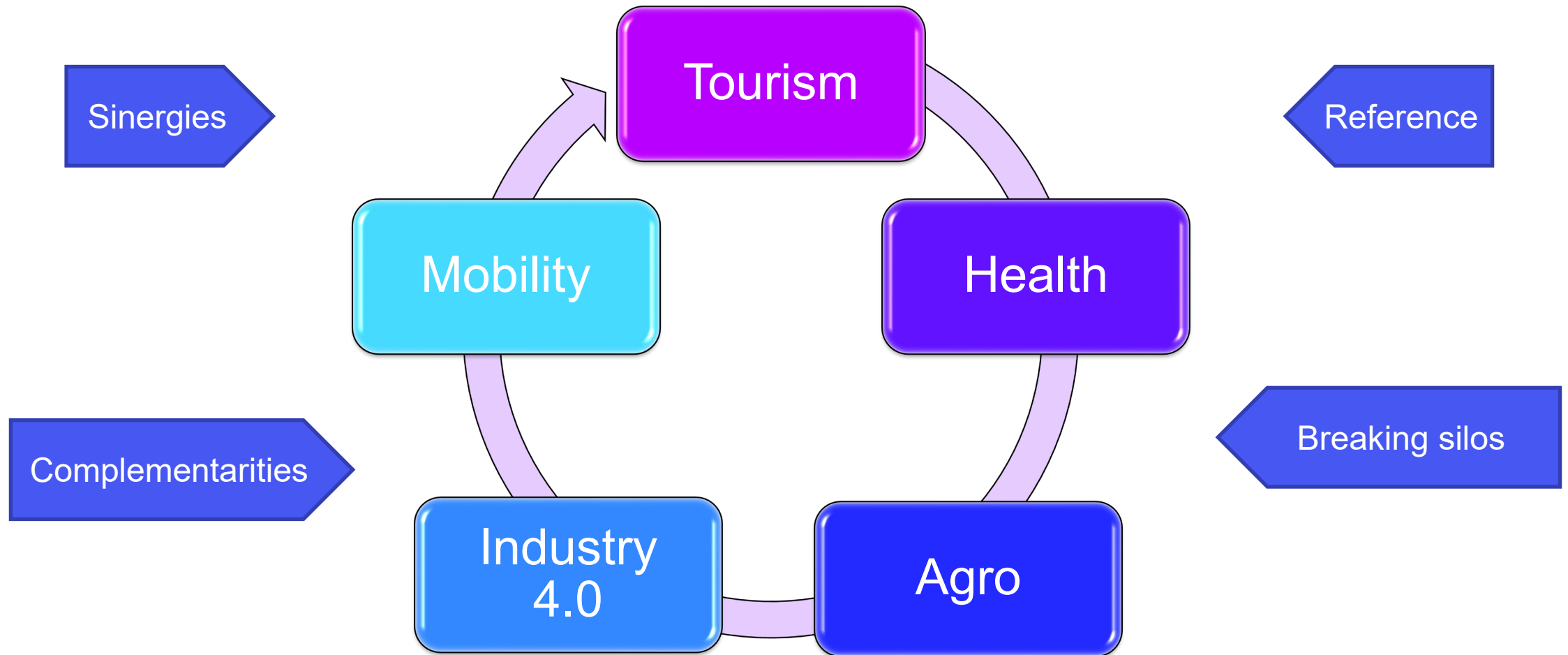


# Aims

- Promote data economy by developing initiatives, infrastructures, services, tools and applications for the controlled, safe and federated **data sharing**
- Increase the **digital sovereignty** of Spain becoming a reference in Data Spaces
- **Bring together** any initiative, project, activity related to data Spaces











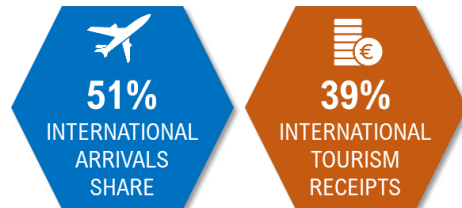


# WHY TOURISM MATTERS?



- Cultural Preservation
- Environmental Protection
- Peace & Security
- Jobs Creation
- Economic Growth
- Sustainable Development

## Tourism in EU



## Tourism Worldwide Economic Impact

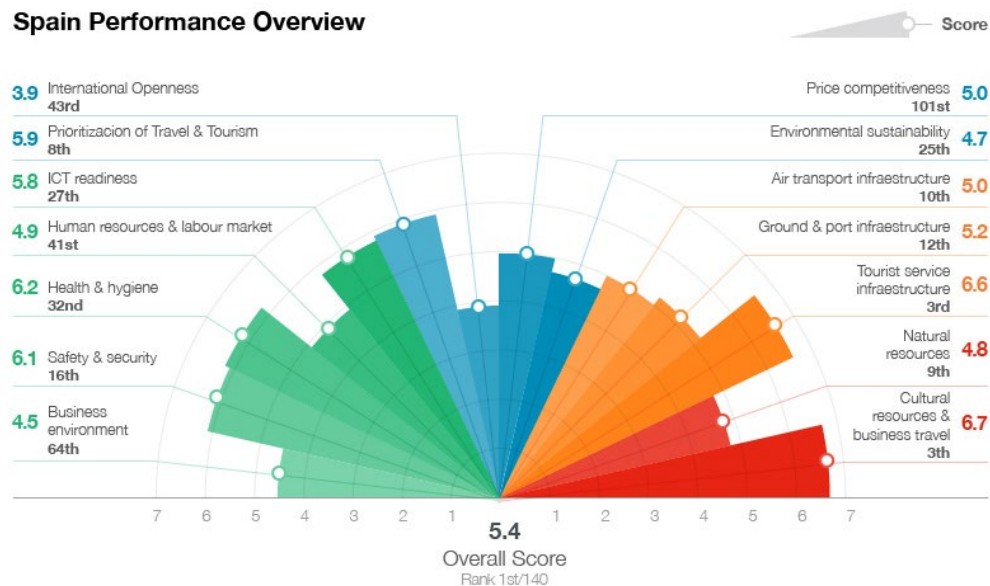


# WHY SPAIN LEADING THE EUROPEAN TOURISM DATA SPACE?

Spain leads the world in tourism. Since 2015 it has placed first on the World Economic Forum (WEF) podium, which awards the most competitive countries in the tourism industry from among 140 economies.

key Indicators	Source	:World Tourism Organisation(UNWTO) and World Travel&Tourism Council(WTTC).
International tourists arrivals		81,868,500
International tourism inbound receipts		US \$ 68,114.1 millones
Average receipts per arrival		US \$ 832.0
T&T Industry GDP (% of total)		US \$ 78,464.0 millones (5.4%)
T&T Industry Share (% GDP)		5.4
T&T Employment (% of total)		958.100 jobs (5.0%)
T&T Industry Share of Employment (% total employment)		5.0

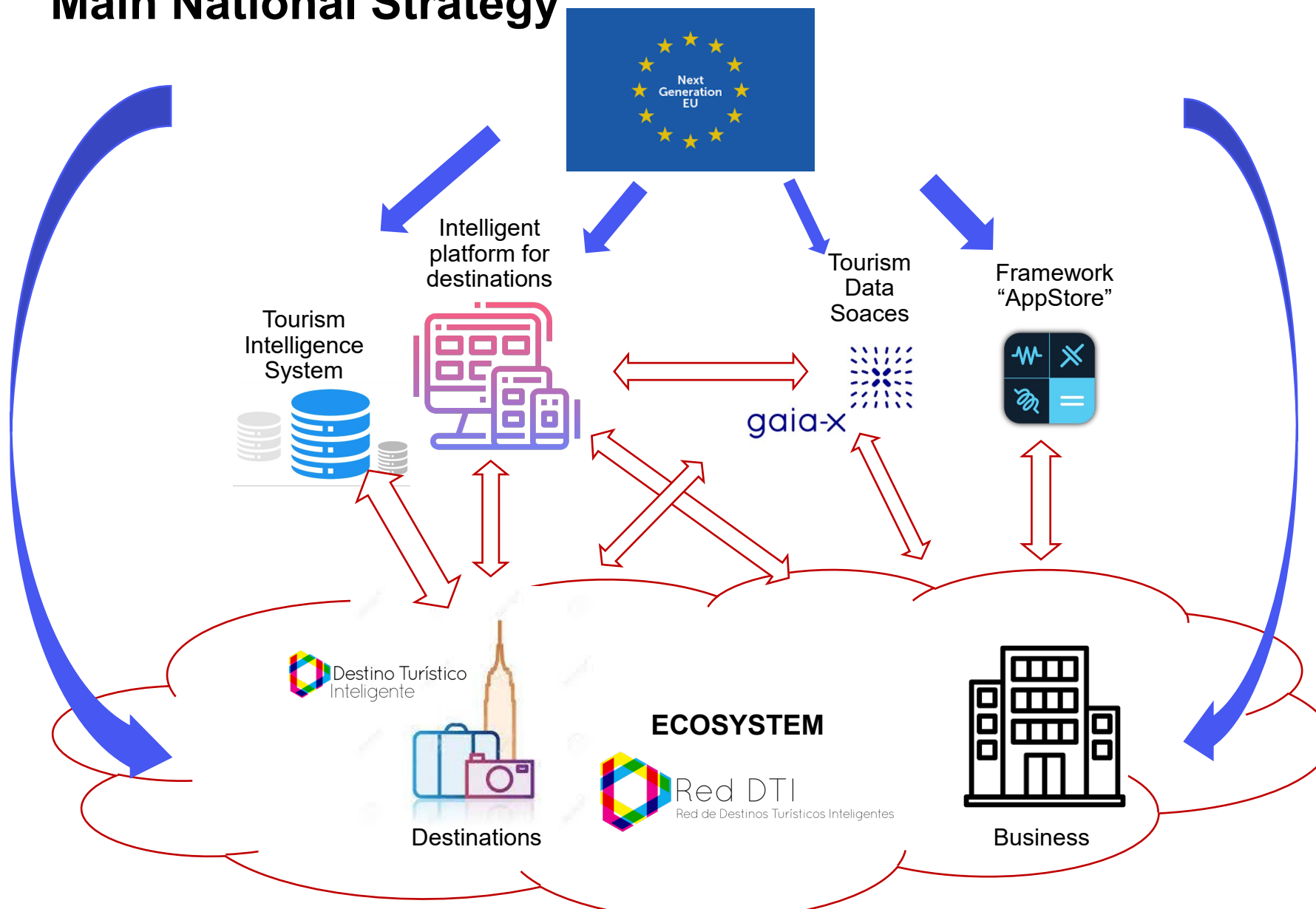
## Spain Performance Overview



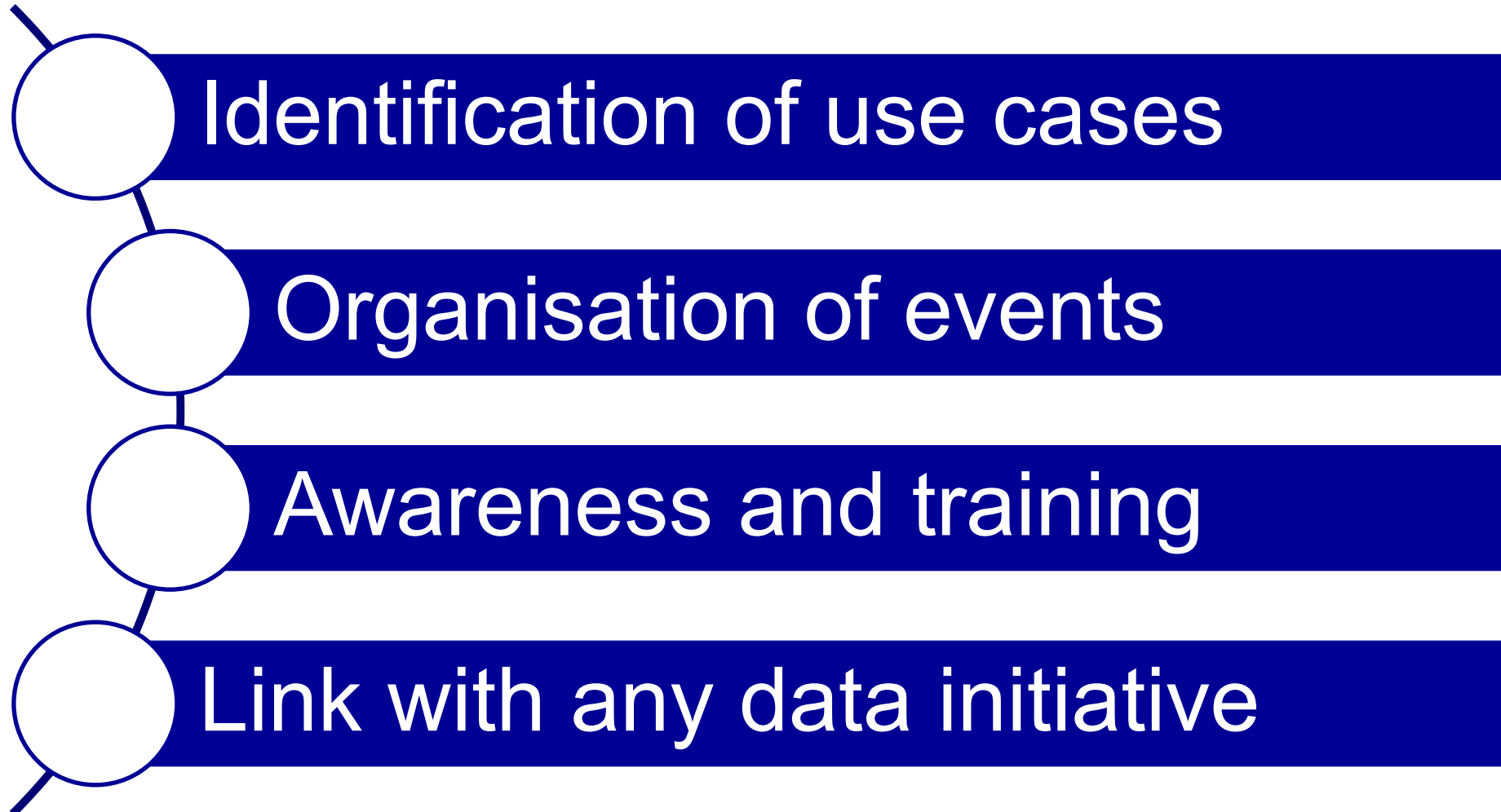
Since 2017 it has broken the record in number of visitors: thanks to the more **than 83 million tourists arriving in Spain**, every year it is recognized as the second most visited country in the world, after France. The United States and China follow.

Spain's success in the tourism industry is due especially to its **rich cultural and natural attractions**, but also to its **exceptional infrastructures**, the **quality of its transportation and hotel density**. These are the three key points that the WEF considers essential to having a competitive advantage over other countries in tourism.

# Main National Strategy







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Thank you!

Dolores Ordóñez: [dom@anysolution.eu](mailto:dom@anysolution.eu)

# Data sharing and transition of tourism



Kirsti Ala-Mutka and Misa Labarile  
European Commission DG GROW – Tourism

# Transition pathway for tourism

- We built this together and must continue working together
- Tourism across EU policies
- Actions, objectives and conditions for accelerating green and digital transition and improving resilience for EU tourism
- **Now calling stakeholders for co-implementation!**



<https://op.europa.eu/s/vNbN>

# Digital transition in tourism is more than just data

- Digitalisation of **SMEs** (99% of ecosystem actors!) -- work processes, service provision, connecting with clients
- Digital processes for **destinations** – managing visitor flows, marketing, following impacts of tourism
- **Innovation** in service provision – personalised services, enhanced experiences, more flexible service provision through new collaborations
- Facilitating **data sharing** between ecosystem actors – legislative framework, technical interoperability, engagement of public and private actors
- **Digital skills** of actors – basic skills, business innovation skills, specialist skills application in tourism



# How can we address all these angles?

## Upcoming: **Together for EU Tourism (T4T)**

- ✓ Communication and outreach
- ✓ Commitments by stakeholders
- ✓ Stakeholder working groups coordinated by DG GROW (a call for experts will soon be published)
- ✓ Integrated support platform for stakeholders
- ✓ Involvement of other EU institutions and services
- ✓ Yearly assessment or progress

**This is the framework in which the data space for tourism will develop.**

**The Transition Pathway offers building blocks.**

# Data in the Transition Pathway (some extracts)

## Topic 3: Improving statistics and indicators for tourism

- Revising harmonised data collection rules on tourism statistics to include elements on economic, social and environmental sustainability
- Improving access to data for producing official statistics
- Including key sustainability indicators on destination level to the harmonised tourism data collection framework
- Implementing the EU Tourism Dashboard to support follow-up of environmental, digital and socio-economic aspects of tourism on EU, national and regional levels

## Topic 13: Promoting the use of the PEF and OEF methodology and the development of sectorial category rules for the tourism ecosystem

- Supporting the uptake of PEF/OEF methods in tourism industries to collect baseline data for sectoral category rules development
- Developing category rules for typical tourism products and services with considerations for different tourism contexts (e.g. remote locations)

## Topic 9: Data-driven tourism services

- Stakeholder cooperation to agree on common practices (Code of Conduct) and to actively share tourism-related data in a European data space for tourism

## Topic 15: R&I for digital tools and services in tourism

- Data-driven destination management models and mechanisms
- Innovative tourism services using advanced technologies (virtual reality, augmented reality, AI) and digitized cultural heritage

## Topic 14: Technical implementation for tourism data space

- Stakeholders to implement a preparatory action for tourism data space

## **Our ambition is to set up a EU data space which:**

- ✓ Facilitates the voluntary pooling and sharing of data
- ✓ Facilitates sharing and generation of both open and private data and public-private collaborations
- ✓ Is interoperable with other sectors' data spaces
- ✓ Is supported by the Pact for Skills

# Data in tourism: different holders, sources, means of collection

NACE (rev.2)	Description
H49	Land transport and transport via pipeline
H50	Water transport
H51	Air transport
I	Accommodation and food service activities
N79	Travel agency, tour operator and other reservation service and related activities
N82	Office administrative, office support and other business support activities
R90-R92	Creative, arts and entertainment activities; libraries, archives, museums and other cultural activities; gambling and betting activities
R93	Sports activities and amusement and recreation activities



# Key lines of action for data sharing in tourism @EU level

- ✓ Code of Conduct for Data Sharing in Tourism
- ✓ Data management for destinations: the Smart Destinations pilot project
- ✓ [Living-in.eu](https://living-in.eu), by DG CNECT
- ✓ Developing new data collection on sustainable tourism (Technical Support Instrument, Eurostat Task Force)
- ✓ Pact for Skills: ensuring basic, business and specialist data skills

**2023: A Digital Europe Programme project to provide the Commission with recommendations and a roadmap to design a common data space for tourism**





Stay tuned. Work with us. Thank you!

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[Misa.Labarile@ec.europa.eu](mailto:Misa.Labarile@ec.europa.eu)

# Portuguese Tourism Initiatives



Sérgio Guerreiro  
Director  
National Ministry of Tourism of Portugal





TURISMO DE  
**PORTUGAL**



# **TURISMO DE PORTUGAL AS A DATA HUB**

**Gaia X Tourism Event**

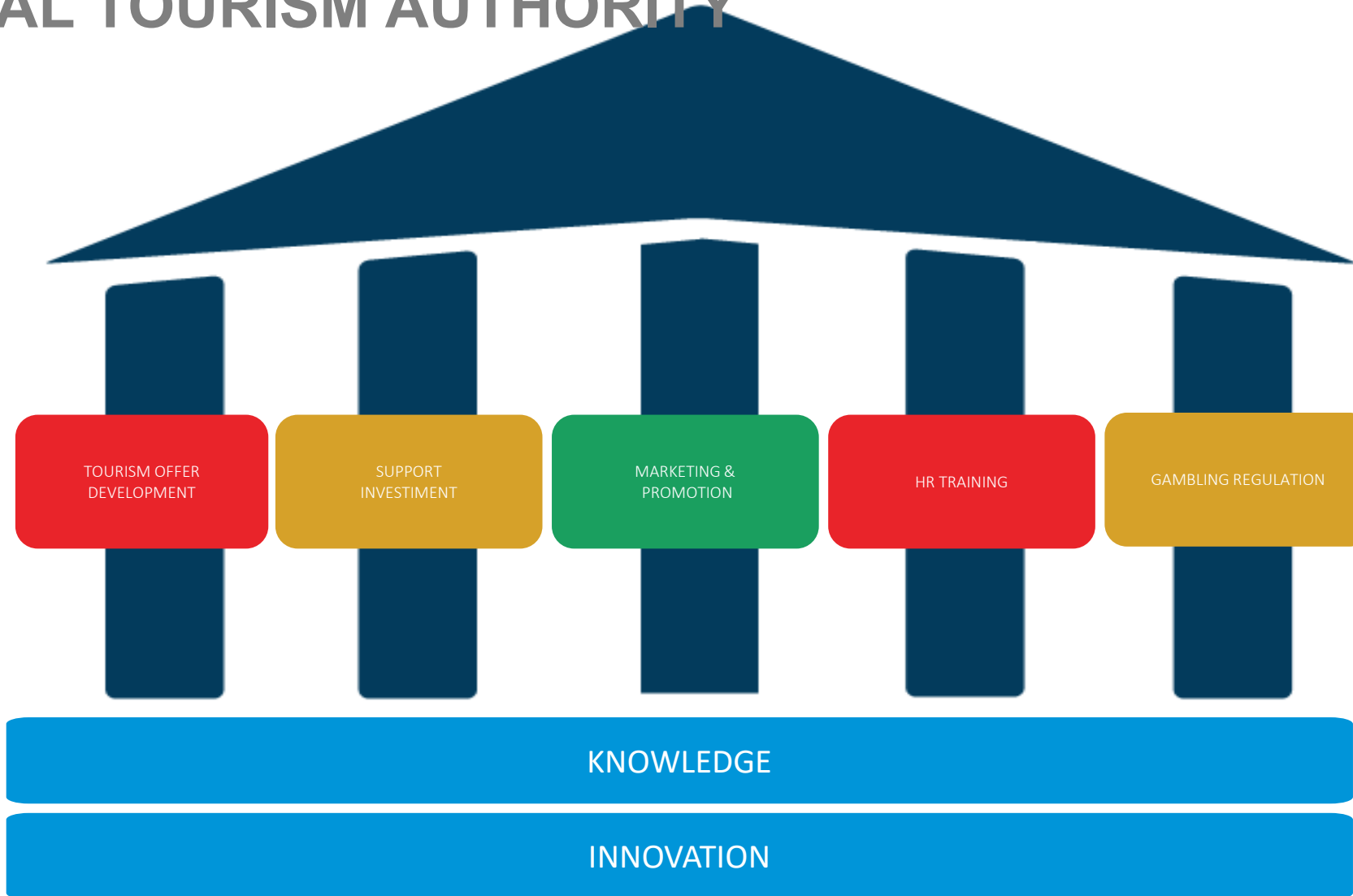
SÉRGIO GUERREIRO

09.06.2022



# ABOUT TURISMO DE PORTUGAL

NATIONAL TOURISM AUTHORITY



# MONITORING DIMENSIONS

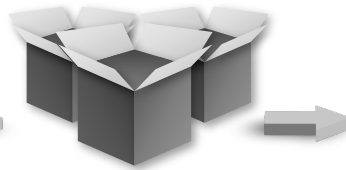
A DATA HUB | + 35 DATA SOURCES



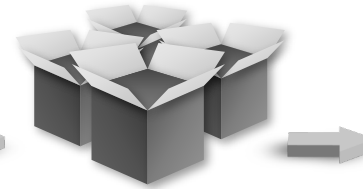
2015



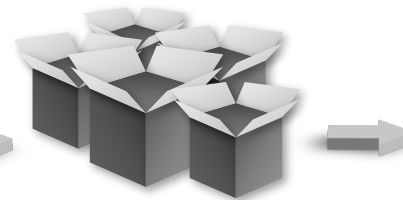
2016



2017



2018



2019



2020



Accommodation



Border Survey  
TSA



Banco de Portugal



Surveys



Sustainability



# TURISMO DE PORTUGAL



## A DATA HUB: MIX OF OFFICIAL STATISTICS + BUSINESS DATA

### OFFICIAL STATISTICS



Accommodation  
Border Survet  
Enterprises  
Employment  
TSA



*Banco de Portugal*

Tourism Receipts



National Registries (Supply)  
Surveys (Demand, Environ,  
Golf, Tourism Activities)



### BUSINESS DATA



Air Capacity  
Air Traffic and Demand



Enterprises



Spending (Bank Cards)



Airlines Data  
Air Demand



Mobile data (Mobility)



# TURISMO DE PORTUGAL



## A DATA HUB: MIX OF OFFICIAL STATISTICS + BUSINESS DATA

**+100**

Dashboards POWERBI

**+25**

Dashboards for internal use

**+20**

Themes

**+428K +115%**

Travel BI Visualizations 2020

- Reducing timing in data dissemination
- Automatic reporting market behavior
- New analysis dimensions( monthly to weekly)
- New dashboards to understand impacts (spending, employment, supply, etc.)
- Predictive data with increasing importance (confidence, reserves, demand)

TIMELINESS

NEW  
DIMENSIONS

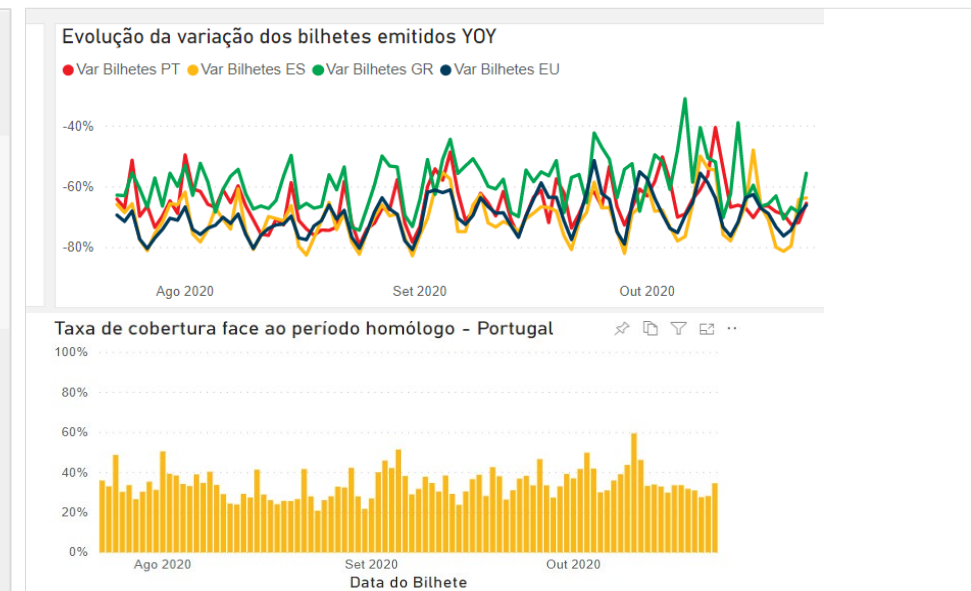
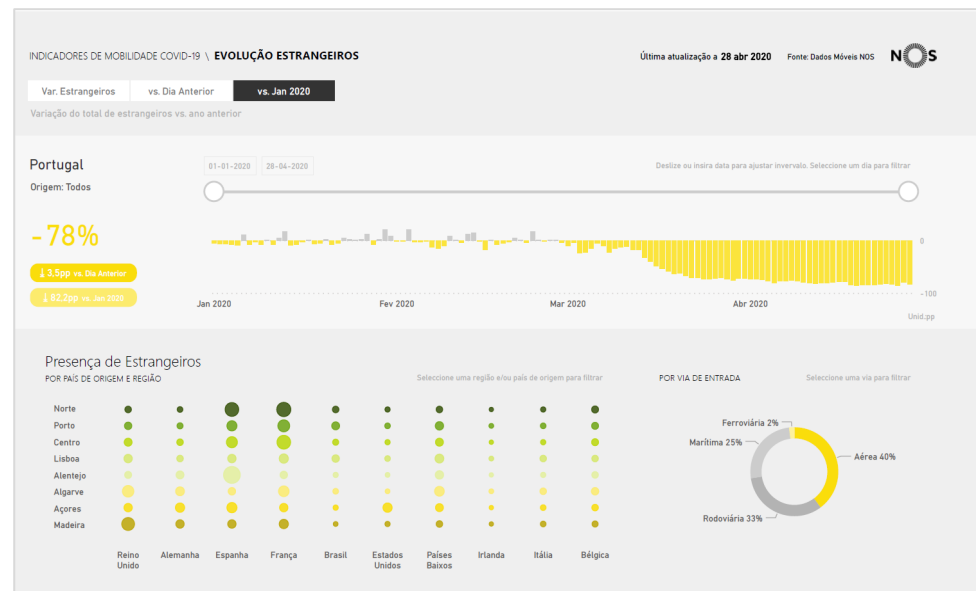
FUTURE

ALMOST REAL  
TIME



# COVID-19 AS AN ACCELERATOR

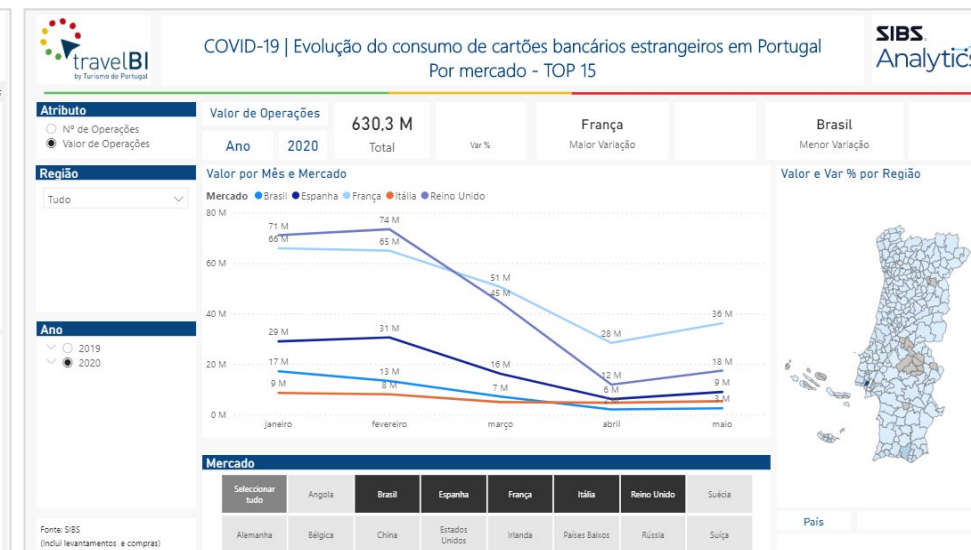
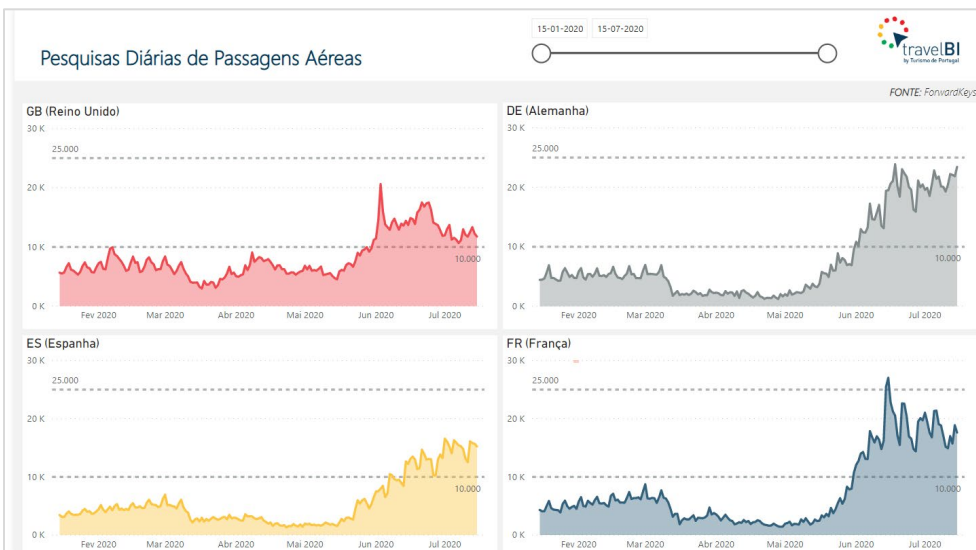
## NEW DATA NEEDS



MOBILITY

LOOKING FORWARD

COMPETITIVE INTELLIGENCE

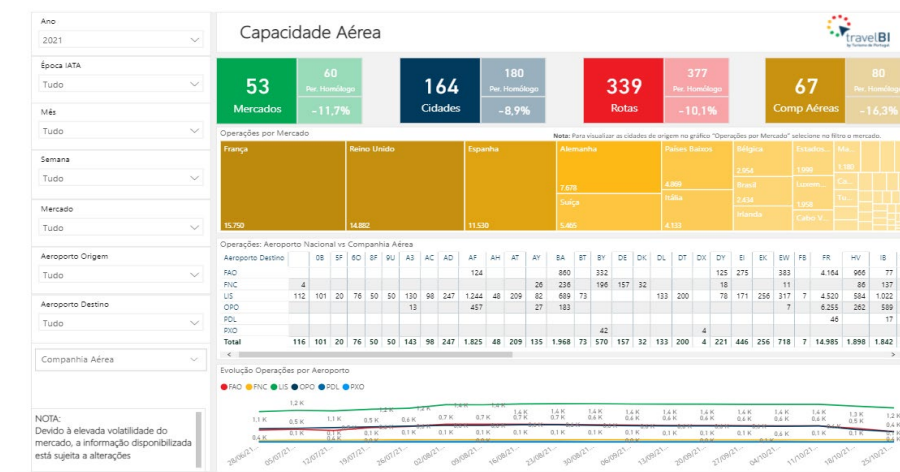
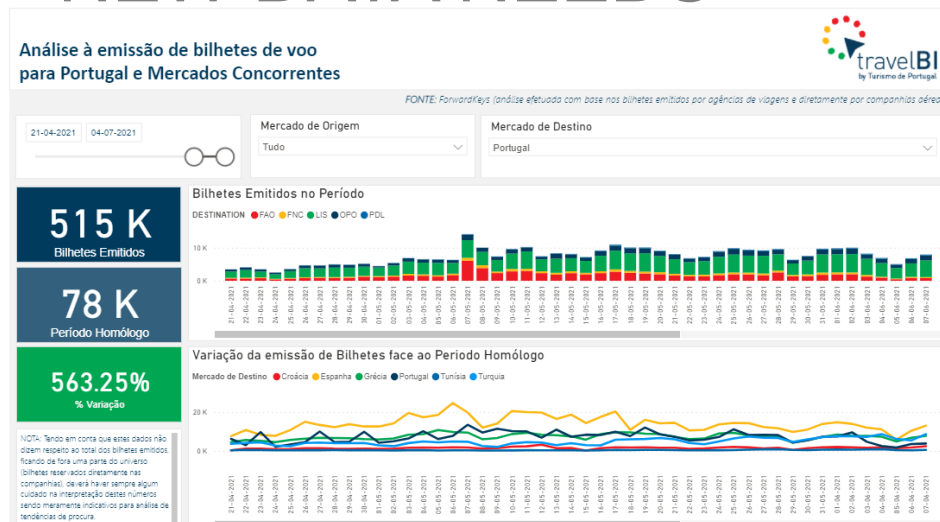


ALMOST REAL-TIME INTEREST

IMPACT IN SUB-SECTORS

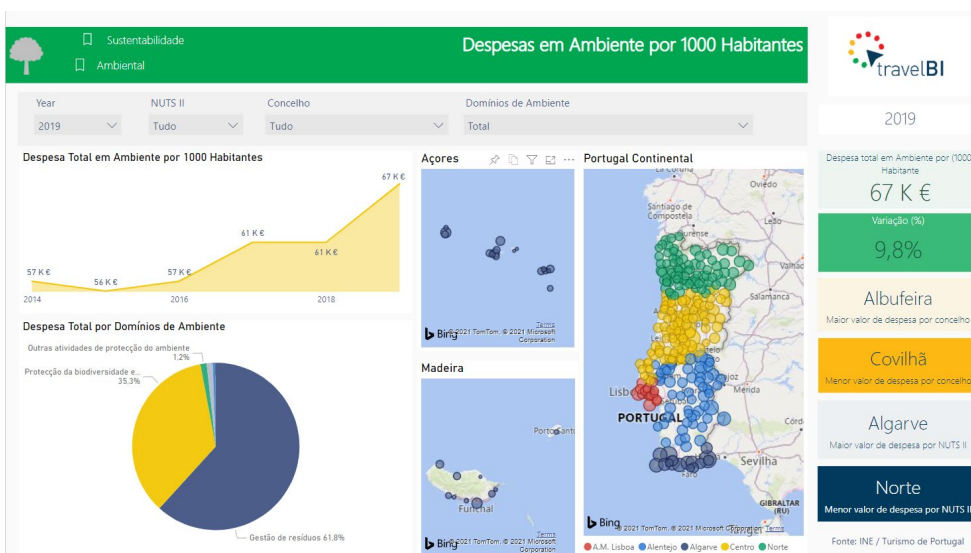
# COVID-19 AS AN ACCELERATOR

## NEW DATA NEEDS



TRAVEL BEHAVIOR

DEMAND RECOVERY



SUSTAINABILITY

Fonte: Turismo de Portugal



# OLD+NEW CHALLENGES

## DATA AS AN ENABLER



- Understand structural challenges in the sector
- Measure sustainability (destinations + businesses)
- Upgrade of official statistics + test new data sources
- Effective use of new data sources in destination management (crowding, mobility, resources)
- From descriptive > forecast > prescriptive



TURISMO DE  
PORTUGAL



# European Dataspaces for Tourism: the Italian Tourism Digital Hub



Francesco Paolo Schiavo  
Head of General Directorate for Valorization and  
Promotion of Tourism  
Italian Ministry of Tourism



# TOURISM INDUSTRY: THE STRATEGIC ROLE FOR ITALY



**13%**

CONTRIBUTION OF TRAVEL &  
TOURISM TO GDP (2019)

**15%**

CONTRIBUTION TO TOTAL  
EMPLOYEMENT

**6.5**

AVERAGE NUMBER OF EMPLOYEES  
IN TOURISM COMPANIES



## ECONOMY

- *Post-Covid economic recovery/NRRP*
- *Circular economy*
- *Jobs*



## ENVIRONMENT

- *Net-zero*
- *Tourism carbon-footprint*



## INDUSTRIES

- *Hospitality*
- *Mobility*
- *Food & Restaurants*
- *Consumer products*
- *Leisure*



## SOCIETY

- *Safety*
- *Governance*
- *Inclusion*
- *Accessibility*
- *Culture*
- *Geopolitics*



## TECHNOLOGY

- *IT vendors*
- *Service providers*
- *Telco*
- *Mobile apps*

TRANSITION  
PATHWAY  
FOR TOURISM

*Italian Tourism ecosystem is undergoing a profound DIGITAL, GREEN and RESILIENT TRANSITION*

# TOURISM IN ITALY: MAIN CHALLENGES ADDRESSED BY INTEROPERABILITY



## ***Offer fragmentation***

*The tourism offer is managed at regional level across the 20 Italian regions and the 2 autonomous provinces.*



## ***Digital divide and attractiveness***

*Wide divide in terms of digital maturity and market attractiveness, especially when comparing southern to northern parts of the country.*



## ***Seasonality and overtourism***

*Need to distribute tourism flows over the year and across destinations to mitigate seasonality, overtourism, and ensure inclusive growth.*

## ***How interoperability can help?***

***Govern the tourism offer at National level by adopting a **unified approach** that move beyond the regional competences***

***Enable compatibility across digital systems and **reduce the digital divide** among different public and private stakeholders***

***Facilitate data sharing across stakeholders in order to **understand demand** and promote the evolution of **integrated and personalized products & services*****

# THE ITALIAN TOURISM DIGITAL HUB

*“Tourism Digital Hub aims to bridge supply and demand in a profitable fashion by engaging with all ecosystem parties involved in inbound tourism”*



# THE KEY ROLE OF INTEROPERABILITY

*Steering role of the central government to implement interoperability at national level*

*Critical success factors for interoperability are technological, organizational and cultural*





# LESSONS LEARNED: FROM ITALY AND BEYOND

## TECHNOLOGY



***A CO-DESIGNED COMMON  
INTEROPERABILITY FRAMEWORK  
DRIVEN AT NATIONAL LEVEL***

## ORGANIZATION



***SUPPORT STAKEHOLDERS TO REACH  
THE NECESSARY MATURITY LEVEL TO  
EXPLOIT THE OPPORTUNITIES OF THE  
DIGITAL AND GREEN TRANSITION***

## CULTURAL CHANGE



***EMBRACE CHANGE TOWARDS A  
MORE DIGITAL AND GREEN OFFER  
BY LEVERAGING NEW SKILLS AND  
TECHNOLOGIES***

---

Thank you

[francescopaolo.schiavo@ministeroturismo.gov.it](mailto:francescopaolo.schiavo@ministeroturismo.gov.it)

# Greek Tourism Initiatives on Tourism Dataspace



Dr Panagiota Dionysopoulou  
Director General of Tourism Policy  
Ministry of Tourism of Greece



# European Strategy for Data- EU Data Act

- One of the driving forces for ensuring Europe's global competitiveness and data sovereignty is the adoption of the **European strategy for data**. Its objective is to make sure the EU becomes a role model and a leader for a society empowered by data.
- The adoption by the EU of the Data Act in February 2022, was an additional measure concerning the digital transformation, objective of the Digital Decade.
- **Key objective:** to maximize the value of data in the economy by ensuring that a wider range of stakeholders gain control over their data and that more data is available for innovative use, while preserving incentives to invest in data generation.

- The value of the EU data economy was more than € 285 billion in 2015, representing over 1.94 % of the EU GDP.
- Adoption of the Communication 'Towards a common European data space' in April 2018.
- A package of measures as a key step towards the creation of a common data space in the EU, a seamless digital area with the scale that will enable the development of new products and services based on data.
- Data, as a key source of innovation and growth, from different sectors, countries and disciplines.



- National Observatory for Sustainable Tourism Development.
- Tourism Satellite Account.
- Research and Monitoring Centre for Coastal and Maritime Tourism in the Mediterranean.
- Surveys on thematic forms of tourism: yachting and mountain tourism and a research on specific source markets: Australia.
- Project: «Greek Application of Big Data Analytics in Smart Tourism».
- LIFE-IP AdaptInGR project: Cooperation with the Ministry of Environment and Energy on climate change.

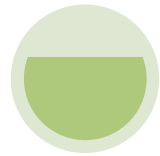
- The Directorate of Research of the Ministry of Tourism is the competent one for the support of the National Observatory and also responsible for the coordination of the administrative Depts. within the Ministry and the co competent stakeholders for its operation.
- ❑ **Key task:** to make use of the data and the findings of the Tourism Satellite Account, to explore profoundly the tourism market aiming to support evidence-based interventions and to propose targeted measures in order to promote all the thematic aspects of the domestic tourism product.

- ✓ **Mission:** to highlight the comparative advantages of tourism destinations, to further strengthen the positive economic results of tourism to the national GDP, while respecting the rich natural and cultural heritage of the destinations, contributing to the development of local communities and always in accordance with the SDGs of UN Agenda 2030.
- ✓ **Outcomes:**
  - An Annual Tourism Sustainability Report will be published, in which the opportunities - inter alia-of sustainable tourism development will be presented.
  - A digital platform and site will be created displaying the sustainable tourism indicators.
  - Through MOUs with the correspondent data providers, a strong network will be built, in terms of mutual cooperation and at a continuous, constant basis, in order to regularly update the database.



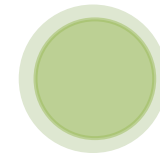
## *The need*

To monitor the sustainable development of coastal and maritime tourism.



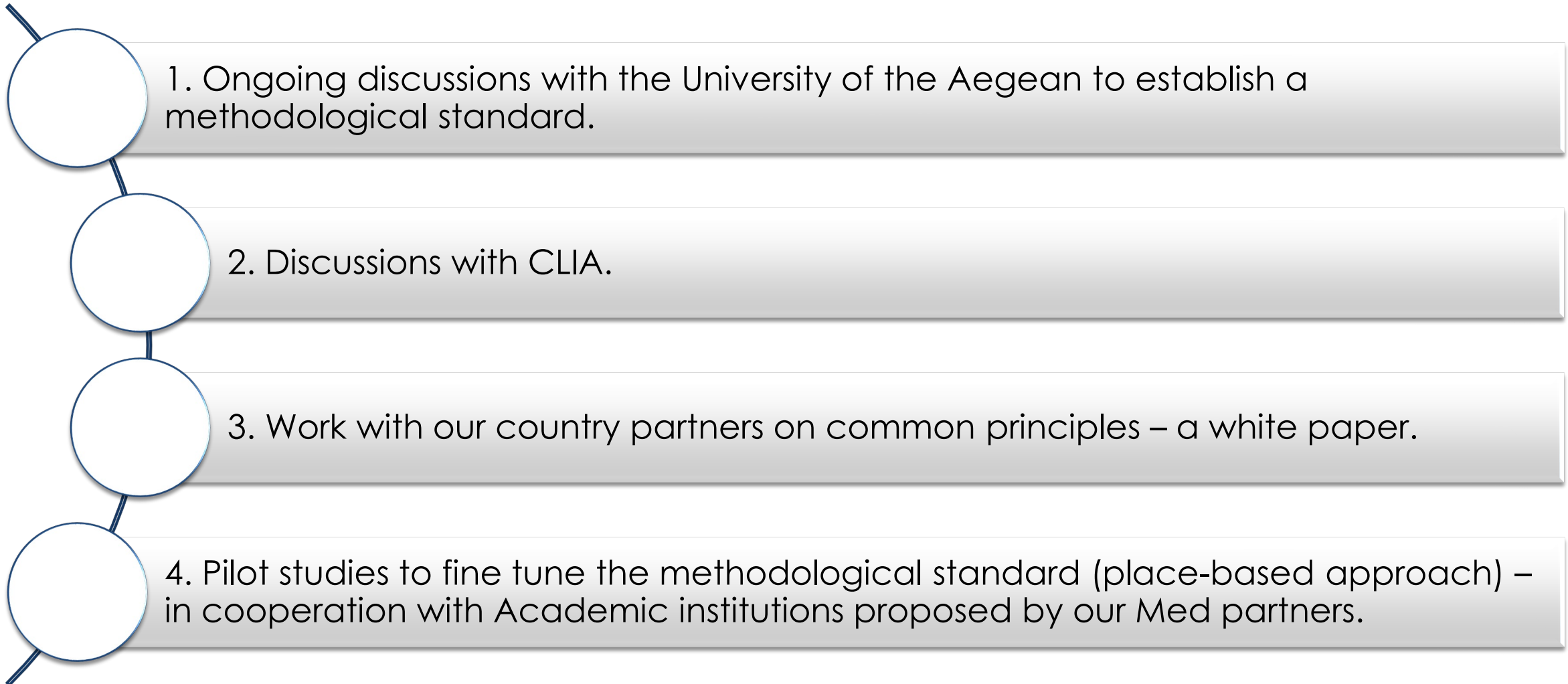
## *The obstacle*

- a lack of timely and comparable data at the coastal spatial scale.
- at destinations and at travel.



## *Our goals*

- To develop a coherent methodological framework for measuring sustainability in coastal and maritime tourism.
- To provide relevant, timely and reliable data on a regular basis.
- To address issues related to insularity.
- To provide policy recommendations, both generic and place specific.
- To improve capacity building.





- Compilation of the 1-10 TSA Tables.
- Cooperation with Hellenic Statistical Authority- Memorandum of Understanding.
- Cooperation with DG Reform- Technical Assistance Instrument.
- Funding through PA 2014-2020.

- ❖ Two surveys on thematic tourism: mountain tourism and yachting.
- ❖ Periodic frequency.
- ❖ **Key objective:** collection and monitoring of the quantitative data on these specific forms.
- ❖ Adjust our Strategy on sustainable tourism development accordingly.

- ❖ The Ministry of Tourism of Greece is currently conducting a research to explore the profile and travel preferences of the Greek Australian community.
- ❖ An online survey is being developed and members of the Greek Australian Community and Greek Australian businesses active in the tourism sector will be requested to contribute their perspectives by completing an online questionnaire in the near future.

- ❖ Interreg V-B «Mediterranean (MED) 2014-2020».
- ❖ Project: «Greek Application of Big Data Analytics in Smart Tourism».
- ❖ **Key task:** the development of a digital tool that will support an evidence based policy in order to promote Greece as a smart tourist destination. Turn the Ministry of Tourism into an Info Hub at national and regional level.

- ❖ LIFE-IP AdaptInGR project.
- ❖ Cooperation with the Ministry of Environment and Energy.
- ❖ **Key mission:** development of the national system for monitoring and evaluating Greece's adaptation to climate change. In this context, a set of indicators has been developed, for monitoring the adaptation of climate change in the tourism sector.



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Thank you!

Dr. Panagiota Dionysopoulou

Director General of Tourism Policy, Ministry of Tourism of Greece

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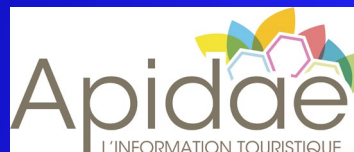
# Greek Tourism Initiatives on Tourism Dataspace



Stavroula Kefala  
Head  
Directorate of Research, Ministry of Tourism

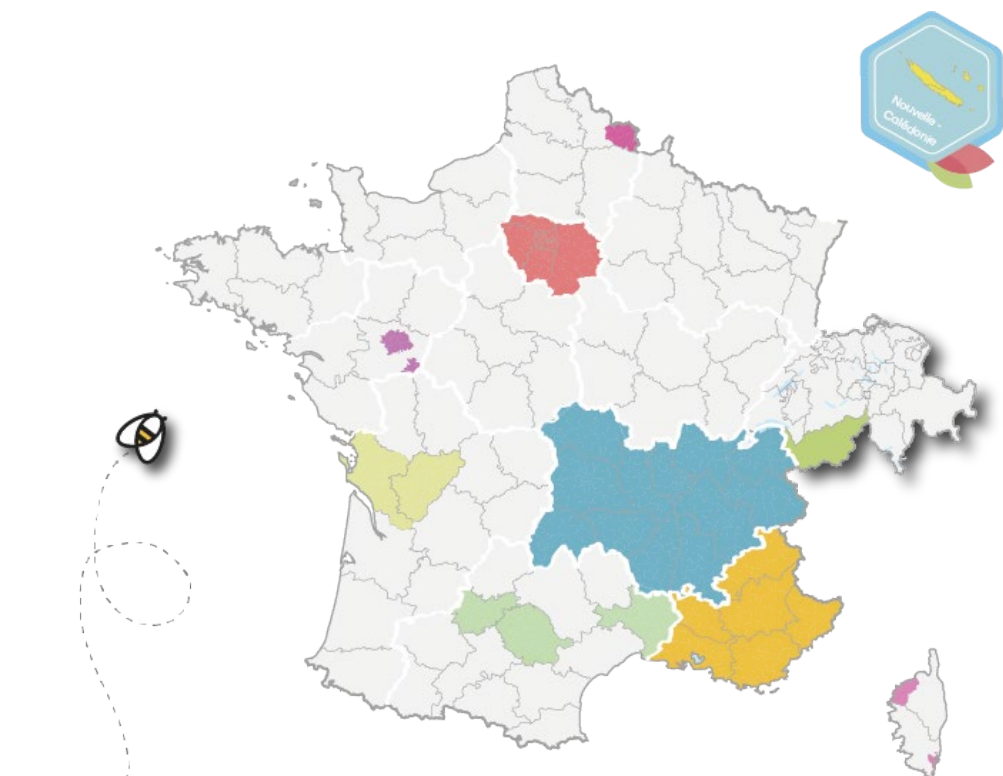


To help drive the local economy throughout France



**Karine Feige, CEO, Apidae Tourisme Scic SA**  
Member of Eona-X

# Creating data makes the cost ⇔ using data makes the value



- **A single database for all** members  
(600 destinations)
- **Tourist data only**  
(411 000 POI )
- **Used by every members to ...**
  - Build the destination brand
  - Welcome and inform tourists and residents about the destination
  - Federate and organize relationship between local actors
- **3 100 projects and uses in progress**  
(web site, Data exchanges ...)

# Benefits of joining EONA-X

- **Unique and efficient data catalog thanks to the quality of its information (coming in real time from the source) and the consistency of the data formats**
- **Facilitator to integrate new standards and provide data to National Access Points**
- **Ideal springboard to build European use cases of multimodal travel integrating both variables related to travel conditions (disruptions, schedules,...) and tourists needs (reduced mobility, points of interest upon arrival,...)**
- **Technical and contractual simplification for the transition from idea to innovation around data sharing between European tourism actors**
- **Reduce to affordable costs the connecting efforts for tourism players**





# Challenge : continue to federate local actors to keep the economy

- **Fight against the dispersion of information** due to the proliferation of business platforms for professionals
  - Do business and share data with those platforms to offer a complementary service alongside us (#ecosystem)
  - They are even part of our cooperative society (investor)
- **Increase the mutual value of our data by appreciating the different nature of the data and sources**
  - Relied on the capacity to create a data exchange format to simplify link and transactions (#FocusOnAgreements)
  - This new value must be fairly share, among the stakeholders
- **Make useful and high value uses**, for the tourist as well as for the locals
  - create an environment that fosters opportunities for new uses and new connections.
  - This is the meaning of the association with Eona-X.  
**Together we are building** destinations brands throughout in France

# As a conclusion for Apidae Tourisme Scic SA

- **Our ambition:** to help drive the local economy throughout France
- **Our strategy :** to multiply exchange opportunities between local actors, to provide the means to circulate data and to imagine use cases
- **Gaia-X and Eona-X act** as a gas pedal in the implementation of this strategy which is consistent with our core values

---

We thank you for your support!

[Karine.feige@apidae-tourisme.com](mailto:Karine.feige@apidae-tourisme.com)

# Overview of the Gaia-X Tourism dataspace landscape in Europe. Mastercard.



Petr Zlamalik  
Director Government and Public Services, Advisors Business  
Mastercard





# Destination Data Platform: “A New Normal”

An example from Goteborg, Sweden

June 9, 2022

Petr Zlamalik, Director, Government and Public Services, Advisors Business Development





# MASTERCARD WORKS CLOSELY WITH EUROPEAN TOURISM LEADERS TO SUPPORT RECOVERY

not exhaustive

gaia-x



**MORT starts using the digital platform "Tourism Insight"**

Share Montenegro 30/09/2020

**Prague City Tourism and partners are launching a new campaign. The capital wants to attract a more upmarket clientele**

**Mastercard Supports POT in Drawing Tourists Back to Poland**

## WHAT?



# Goteborg & Co has a goal to create joint Destination Data Platform (DDP) for the visitor industry, and to facilitate the post-pandemic recovery

### Rationale for the platform

- Bring together various data linked to tourism
- Analyze data sets
- Provide decision-making information for future investments and initiatives

### Benefits for Goteborg

- Support digital development of Gothenburg's visitor industry
- Clearer insights and better decision-making support
- Driving greater opportunities for a stable, sustainable post-pandemic recovery

### Critical components and Success factors

- Create and develop a **joint destination data platform**, in which visitor data is gathered, anonymized, segmented and processed
- Provide greater **insights and knowledge on visitors to the city** and the visitor industry's stakeholders
- Establish the right conditions for **research, development and innovation** within the visitor industry

## Goal of DDP is to both drive growth & support education and development of tourism sector within destination



### Objectives

To both **drive growth & support education** and **development of tourism sector**

In order to achieve the this, we need to:

#### 1 Understand the market:

- Trends
- Tourism flows (markets, segments)
- Tourist behavior (spend, length of stay, frequency)

#### 2 Maximize marketing efforts:

- Markets and segments to be prioritized
- Best approach to attract visitors
- Optimization of resources allocation

#### 3 Increase visitors stays and spends

- Enhance visitor experience
- Optimize investment for seasonal & in-journey traffic

#### 4 Maximize positive economic, social and environmental impact

- Benefits to help local businesses / SMEs



### DDP

Content aggregator of data, that drives insights around visitors spend behavior and behavior at destination

#### What

- Access to **cloud-based data and insights**
- Data is obtained from **different sources** (Mastercard, Google, data donors...) covering the **traveler journey** (search, booking, spend and sharing)

#### How

- Insights are customized according to client's needs (Country, region, city, competing destinations benchmarks)

#### Output

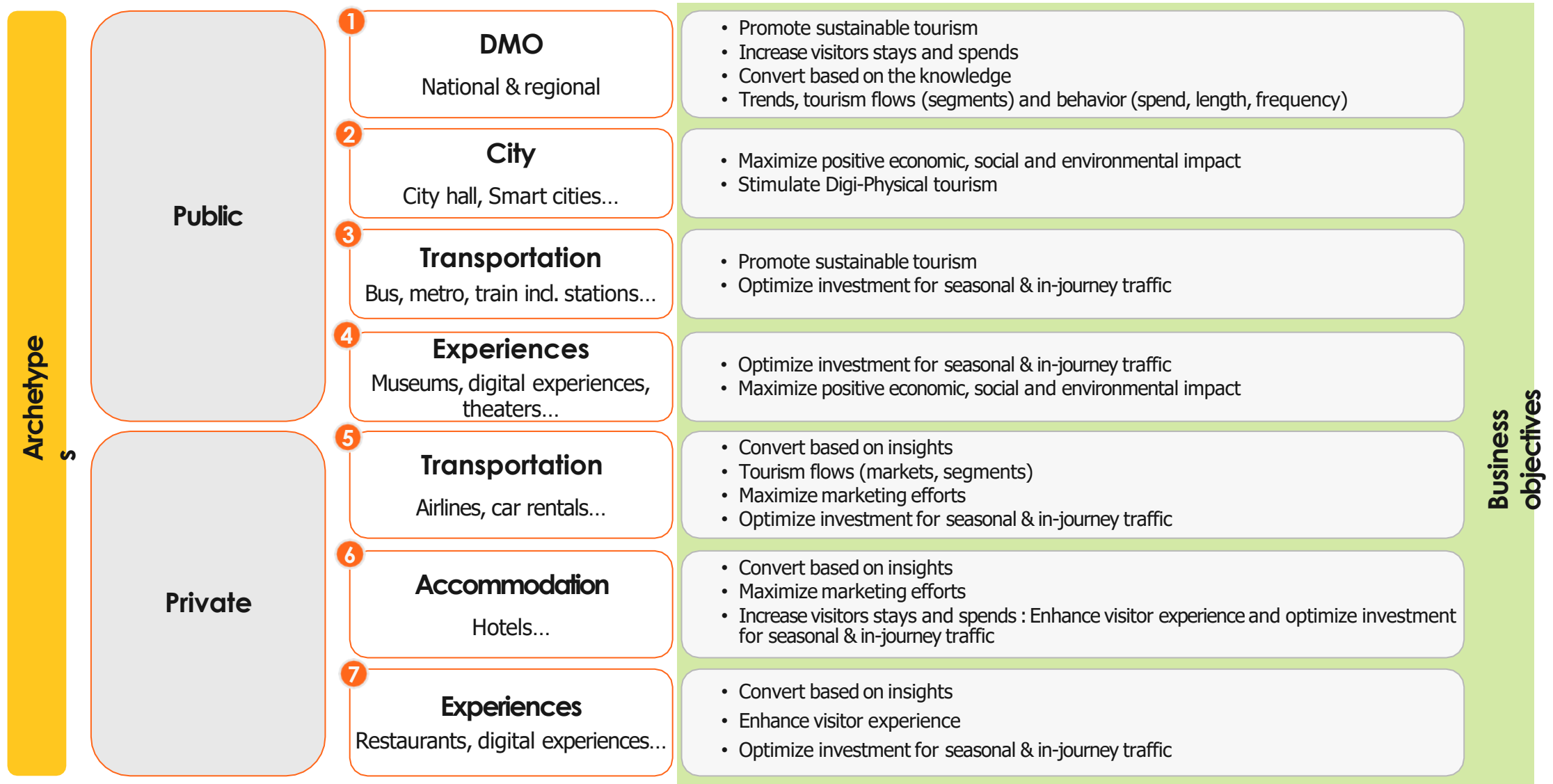
- Answer to key tourism questions (market trends, marketing ROI, travelers stay and spend, etc.)
- Customized traveler insights integrating multiple data sources

#### Key differential characteristics

- Be the **new European Standard** for **calculating tourism impact**
- **Granular insights** on segments
- **Up-to date info** from different sources
- Enables partners to **donate data**, and get insights about the visitor outside their own operations
- **Focused on a sustainable tourism** (economic, environmental and social)
- **Behavior spend and behavior at destination**
- **GDPR Compliant**
- **New business opportunities**
- within public and private sector
- Stimulate **Digi-Physical tourism**

## WHY?

Key business objectives slightly differ across multiple stakeholder archetypes, but overall aim is to support Tourism development across public and private sector



# Thank you

Petr Zlamalik

Director  
Government and Public Services

Advisors Business Development, Mastercard

[petr.zlamalik@mastercard.com](mailto:petr.zlamalik@mastercard.com)



# Keynote: The European Tourism Landscape & its digitalisation.



Maribel Rodríguez  
Senior Vice President  
WTTC





# The European Tourism Landscape & its Digitalization

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**Maribel Rodríguez**  
SVP, Membership Commercial & Events  
WTTC

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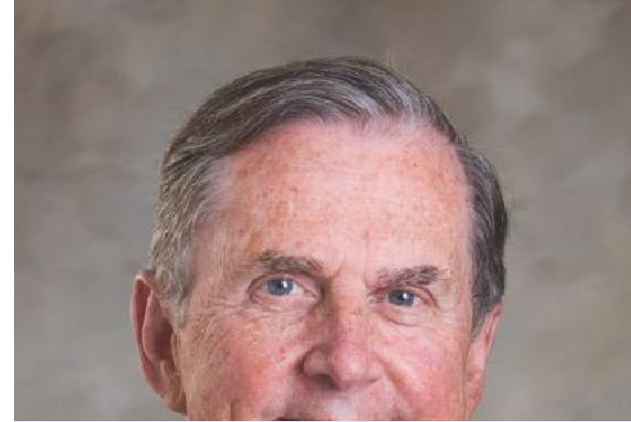
# The Authority on World Travel & Tourism

The body representing the global Travel & Tourism private sector

For 30 years we have been quantifying the impact of Travel & Tourism in 185 countries in our Research

Our goals include highlighting:

- Economic value of Travel & Tourism
- Fair economic policies for the sector
- Long-term, sustainable growth



**JAMES D ROBINSON III**  
American Express Company,  
Former Chairman & CEO



**ROBERT CRANDALL**  
American Airlines,  
Former CEO



**COLIN MARSHALL**  
British Airways,  
Former CEO



**BILL MARRIOTT**  
Marriott International,  
Executive Chairman



# WTTC Members

WTTC Executive Committee

200 Members (CEOs and Chairs) | All geographies | All industries in Travel & Tourism

Airports

Airlines

Cruise

Destinations

Tour Operators

Travel Companies

OTAs

GDS

Car Rental

Hotels

Digital Players

Travel Services



**CARNIVAL CORPORATION**  
Arnold Donald  
President & CEO



**HILTON**  
Christopher J Nassetta  
President & CEO



**INTERCONTINENTAL HOTELS GROUP**  
Keith Barr  
CEO



**VALUE RETAIL**  
Desirée Bollier  
Chair



**INTREPID GROUP**  
Darrell Wade  
Co-Founder & Chairman



**TUI GROUP**  
Friedrich Jousen  
CEO



**MSC CRUISES**  
Pierfrancesco Vago  
Executive Chairman



**ROYAL CARIBBEAN CRUISES**  
Jason Liberty  
President & CEO



**RADISSON HOTEL GROUP**  
Federico J. González  
CEO



**AMERICAN EXPRESS COMPANY**  
Glenda McNeal  
President, Enterprise Strategic Partnerships



**EUROPEAN TRAVEL COMMISSION**  
Luis Araújo  
President



**DUBAI AIRPORTS**  
Paul Griffith  
CEO



**SANDALS RESORTS**  
Adam Stewart  
Executive Chairman



**JLL**  
Gilda Perez-Alvarado  
Global CEO, Hotels & Hospitality



**ATOUT FRANCE**  
Caroline Leboucher  
Directrice générale / CEO



**VIRTUOSO**  
Matthew Upchurch  
President & CEO



**CWT**  
Patrick Andersen  
CEO



**TURESPAÑA**  
Miguel Sanz  
Director General



## Strategic framework: *Beyond COVID-19 / New Era of Travel*

WTTC will focus beyond the COVID-19 recovery to support a sector that will emerge stronger and thrive.

To best serve its membership the WTTC team will innovate, diversify and look into future challenges and opportunities to ensure a brighter, more inclusive, resilient and sustainable future for Travel & Tourism.

### Travel & Mobility

*Travel through borders is safe, quick and easy. Removal of restrictions and barriers.*

- Biometrics
- Visa facilitation
- Cyber resilience
- Digital passes and passports
- Digital immigration systems



### Sustainable Future

*Preserve the environment and reduce the sector's carbon footprint, while maximising T&T's social impact.*

- Net Zero T&T
- Biodiversity
- Circularity
- Destination readiness and stewardship
- Future of work
- Inclusion and diversity



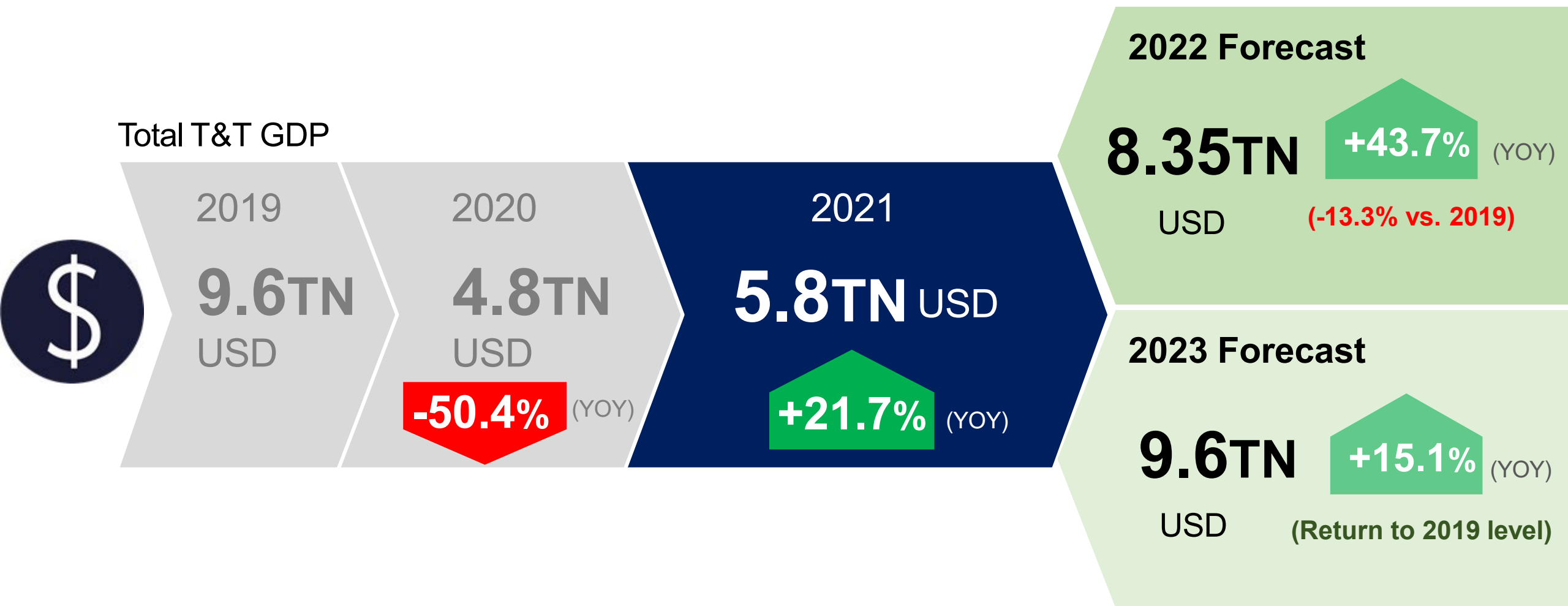
### Digital Transformation

*T&T's leading innovation in our sector.*

- Future Travel
  - Supersonic air travel
  - Mobility and Urban air transport
  - Driverless
  - Space Ports and Tourism
- Technology Enablers
  - Artificial intelligence
  - Metaverse & virtual business
  - 5G



# Forecast: Global T&T GDP Recovery



# Forecast: Employment Recovery

Total T&T Jobs



2019

**333MN**  
Jobs

2020

**271MN**  
Jobs

**-18.6%** (YOY)

2021

Current Trajectory:  
**289MN** Jobs

**+6.7%** (YOY)

2022 Forecast

**300MN** **+3.5%**

Jobs **(-10.1% vs. 2019)**

2023 Forecast

**324MN** **+8.2%**

Jobs **(-2.7% vs. 2019)**



# Economic Impact Timeline 2022-2032



2022-2032 key facts:

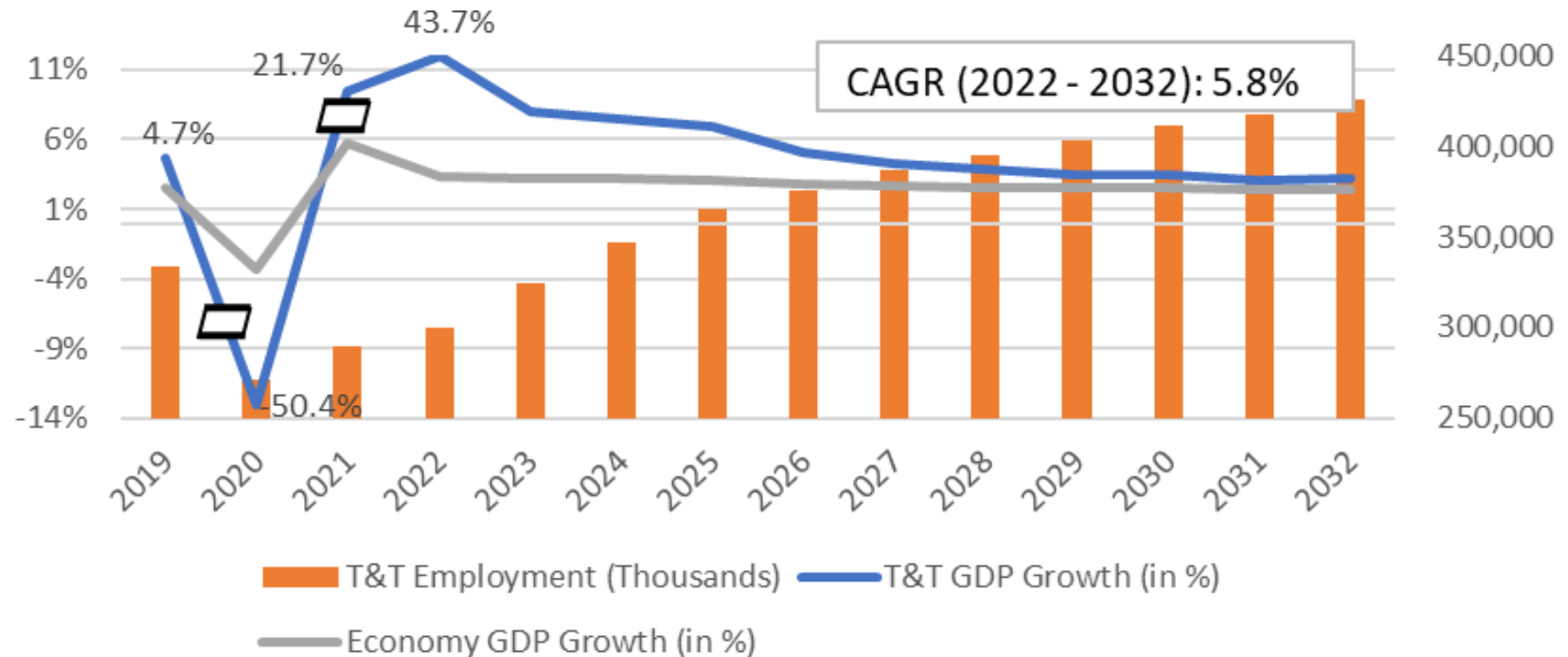
**126 million  
new jobs**

**+5.8%**

Average Annual Growth  
(T&T GDP)  
Vs

**+2.7%**

Global Economy GDP  
average annual growth rate



# Europe – key figures



2019	2020	2021
Total contribution of Travel & Tourism to GDP:		
 <b>9.2%</b> of Total Economy EUR 1,944.7BN (USD 2,141.4BN)	<b>5.2%</b> of Total Economy EUR 1,029.1BN (USD 1,133.2BN) Change: -47.1% Economy change: -5.7%	<b>6.2%</b> of Total Economy EUR 1,316.9BN (USD 1,450.1BN) Change: +28.0% Economy change: +5.7%
Total contribution of Travel & Tourism to Employment:		
 <b>37.82MN</b> 9.9% of total jobs	<b>33.08MN</b> 8.8% of total jobs Change: -12.5%	<b>34.65MN</b> 9.1% of total jobs Change: +4.7%

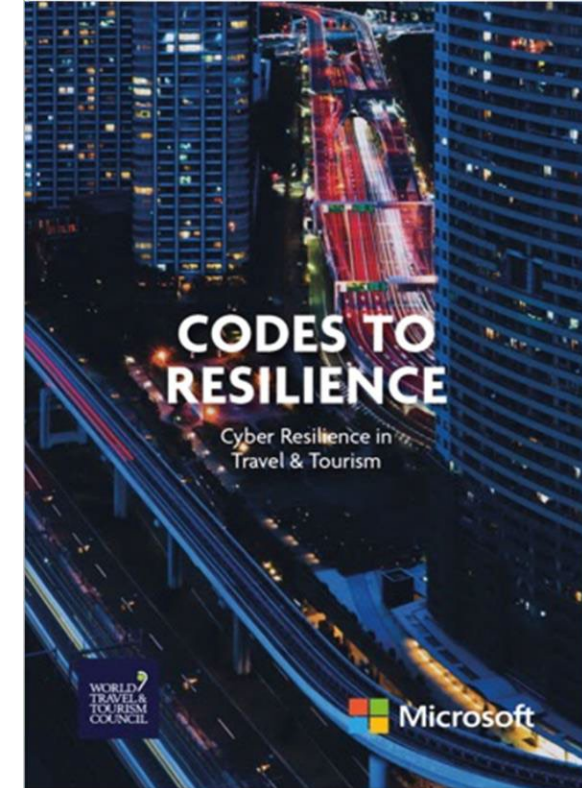
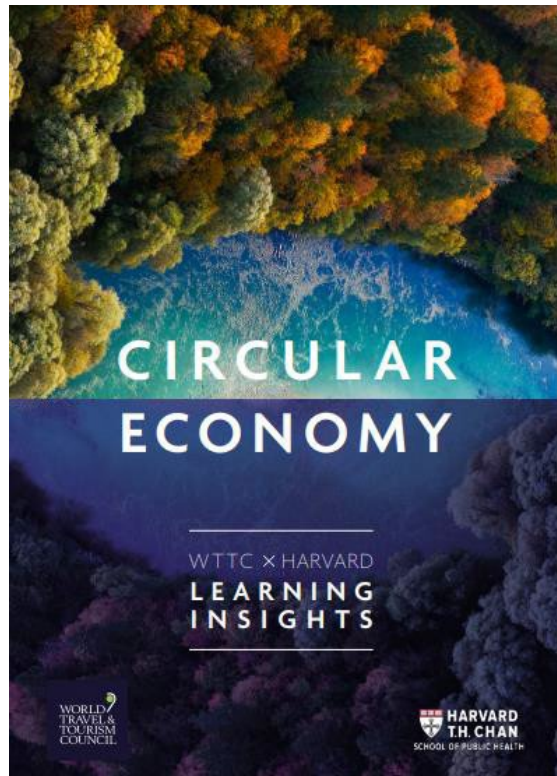
## Importance of data in travel and tourism

- Information in T&T is **invaluable**.
- Necessary collaboration between different stakeholders.
- WTTC collaborates with our members to offer answers about relevant topics in the sector, **sharing data and knowledge** with the most important expert organizations.
- WTTC develops **reports and studies** to share added value to our sector counting with our members insights and industry leaders.
- Governments use our data for policy decision making.





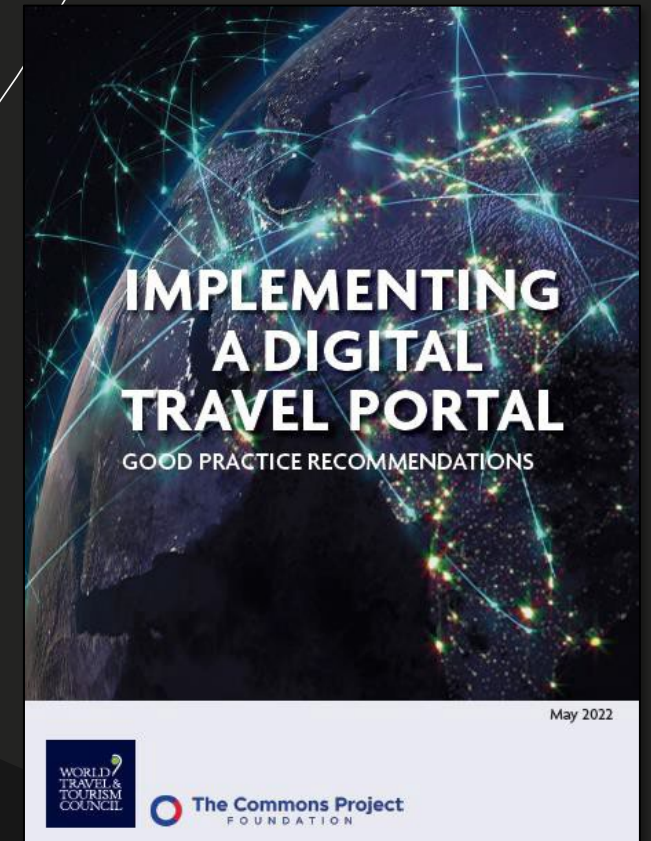
# WTTC Reports - Research





# Digital Travel Portal Report

*Simple, digital, one-stop-shop solution to complete traveller checks 'pre-travel' and 'off-airport'*



W T T C & P U E R T O R I C O  
**SUSTAINABILITY  
+ INVESTMENT**  
S U M M I T | 1 4 J U N E 2 0 2 2





# WORLD TRAVEL & TOURISM COUNCIL GLOBAL SUMMIT

28 NOVEMBER - 1 DECEMBER 2022  
RIYADH, SAUDI ARABIA

  
WORLD  
TRAVEL &  
TOURISM  
COUNCIL

وزارة السياحة  
Ministry of Tourism





# Thank you

For more details visit [www.wttc.org](http://www.wttc.org)  
or contact [Maribel.Rodriguez@wttc.org](mailto:Maribel.Rodriguez@wttc.org)



WTTTC.org



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Strategic  
Partners

AMERICAN  
EXPRESS

Ministry  
of Tourism  
Saudi Arabia



GLOBAL **+rescue**

PUERTO RICO  
TOURISM  
COMPANY



# Pillars of a Tourism data space: Architecture & Platforms

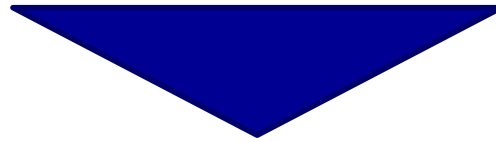


Dr Alberto Palomo  
State Secretariat for Digitalization and Artificial Intelligence/CDO -  
Spanish Government  
Governmental Advisory Board of Gaia-X AISBL



# What do we understand a Data Space is?

A Data Space can be understood as any place where data-sharing takes place



GOAL

Structures that provide security & trust for voluntary data-sharing at scale  
across federated participants

Based on common  
technological & governance  
mechanisms

- ❑ Data-sharing is critical for the *Data Economy*
- ❑ Need a guarantee of sustainability & resilience

# Design principles for data spaces



<b>Data sovereignty</b>	Capabilities for self-determination of owned/ managed data assets
<b>Levelled playing field</b>	No barriers of entry in a data space because of monopolistic situations
<b>Decentralized soft infrastructure</b>	<p>The common infrastructure is the collection of various interoperable data spaces</p> <p>Based on unnoticeable technology-neutral capabilities that fulfill functional &amp; non-functional requirements such as findability, interoperability, portability, security, privacy, trustworthiness</p>
<b>Public-private governance</b>	<p>All stakeholders should feel represented and engaged</p> <p>Key for massive adoption</p>

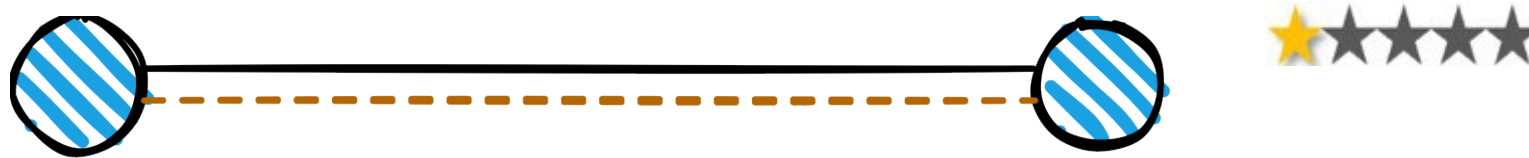


# Degree of federation in data-sharing models





# Bilateral Data-sharing



Data provider or consumer



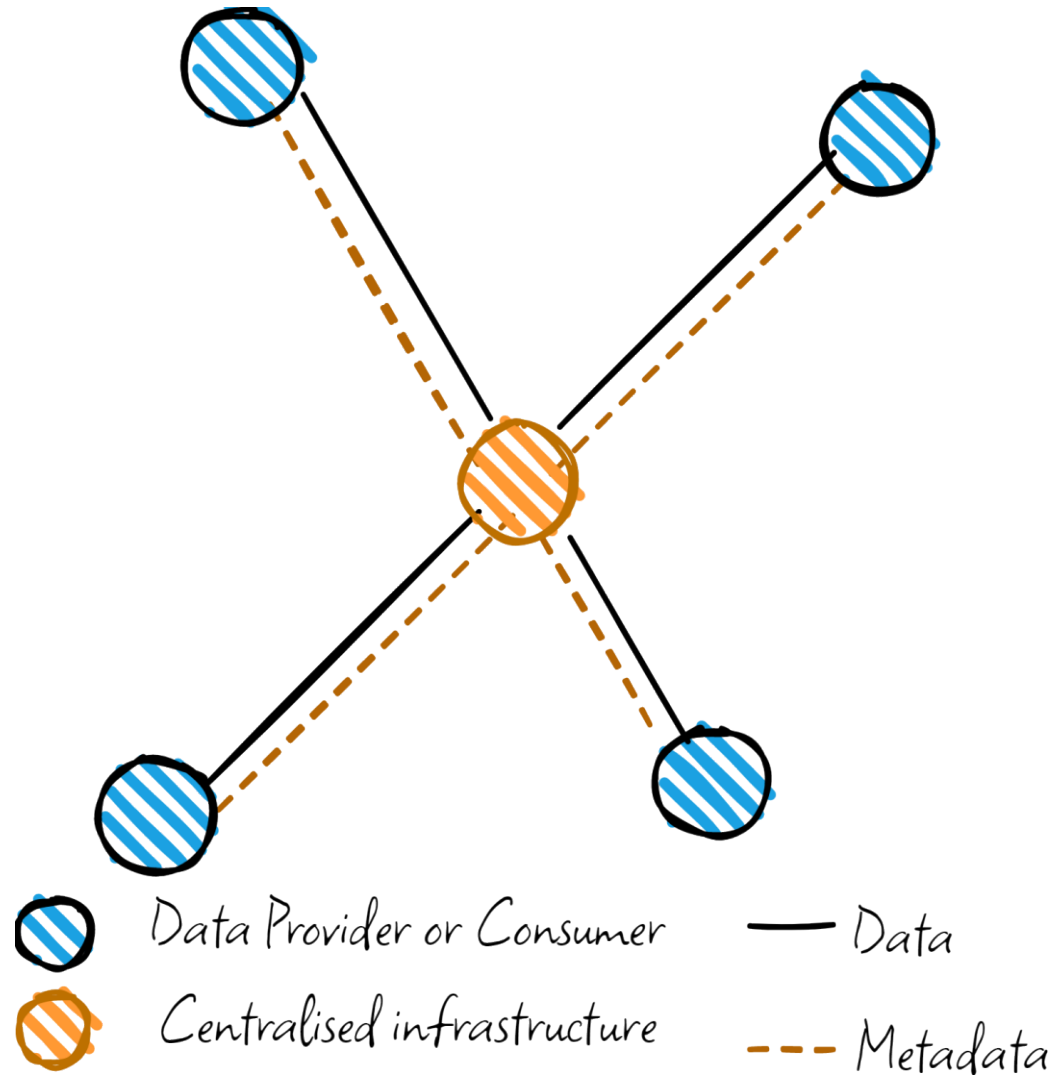
Data



Metadata

Participants know each other, and share data without intermediaries

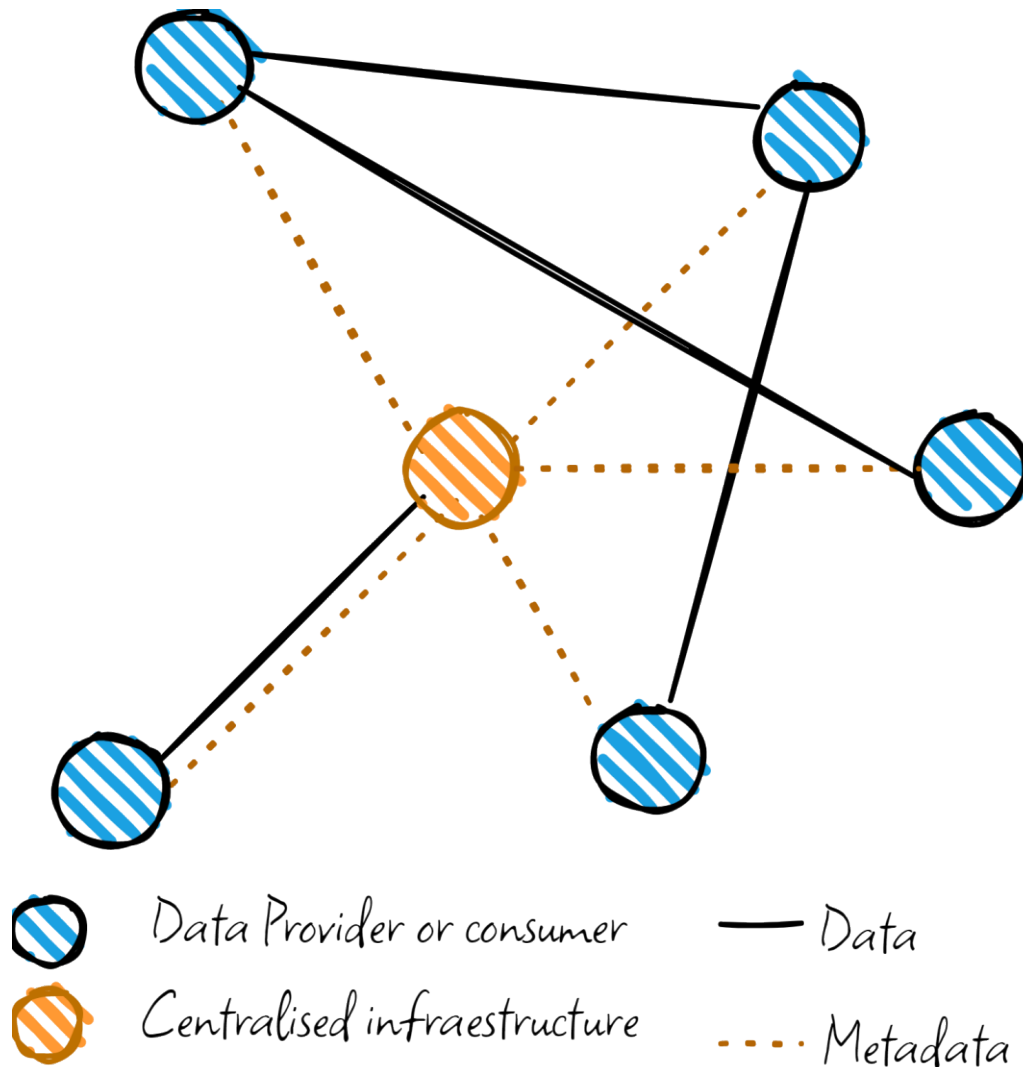
# Centralized Node



Data is transferred to a central repository, where it can be exploited by various participants

A Data Lake architecture (also a Lakehouse's)

# Data Hub/ Marketplace

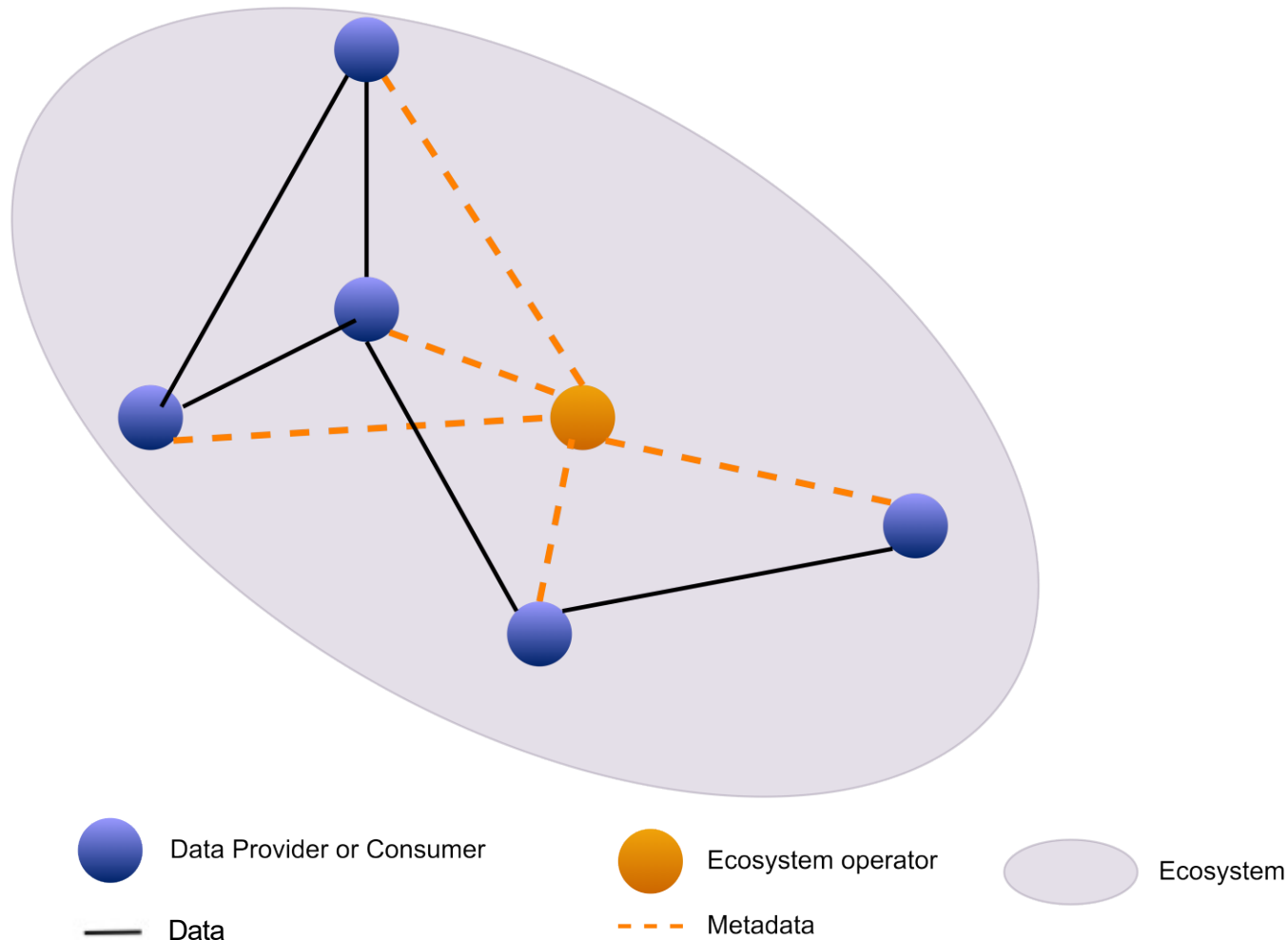


A central infrastructure offers a catalog + connects data providers/ consumers (that may or may not know each other previously).

Data may be downloaded from a hub, or transferred peer-to-peer

There is a data space operator responsible for the overall governance

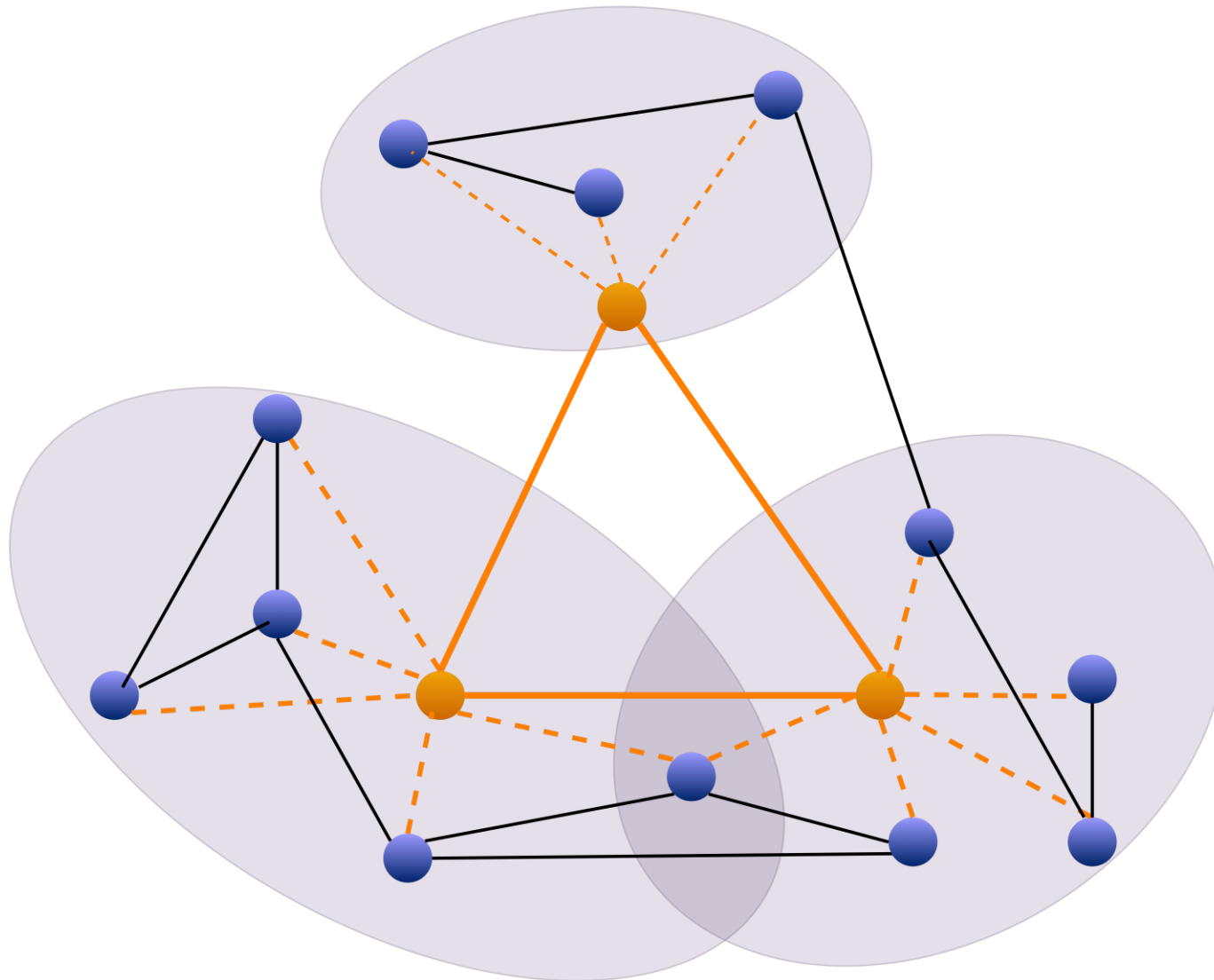
# Federated Data Ecosystem



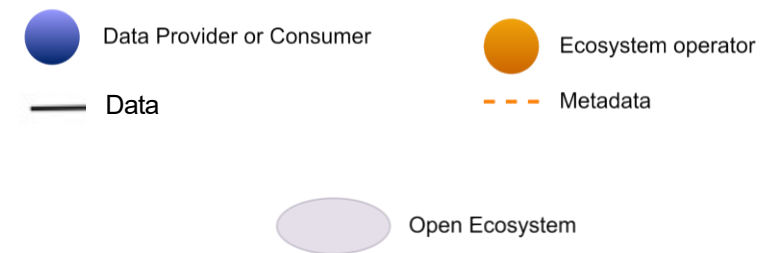
Federated network of autonomous participants:

- Interoperable technology
- Multi-vendor data services
- Open Source Software
- Public-private governance

# Ecosystem of Ecosystems (Data Spaces)

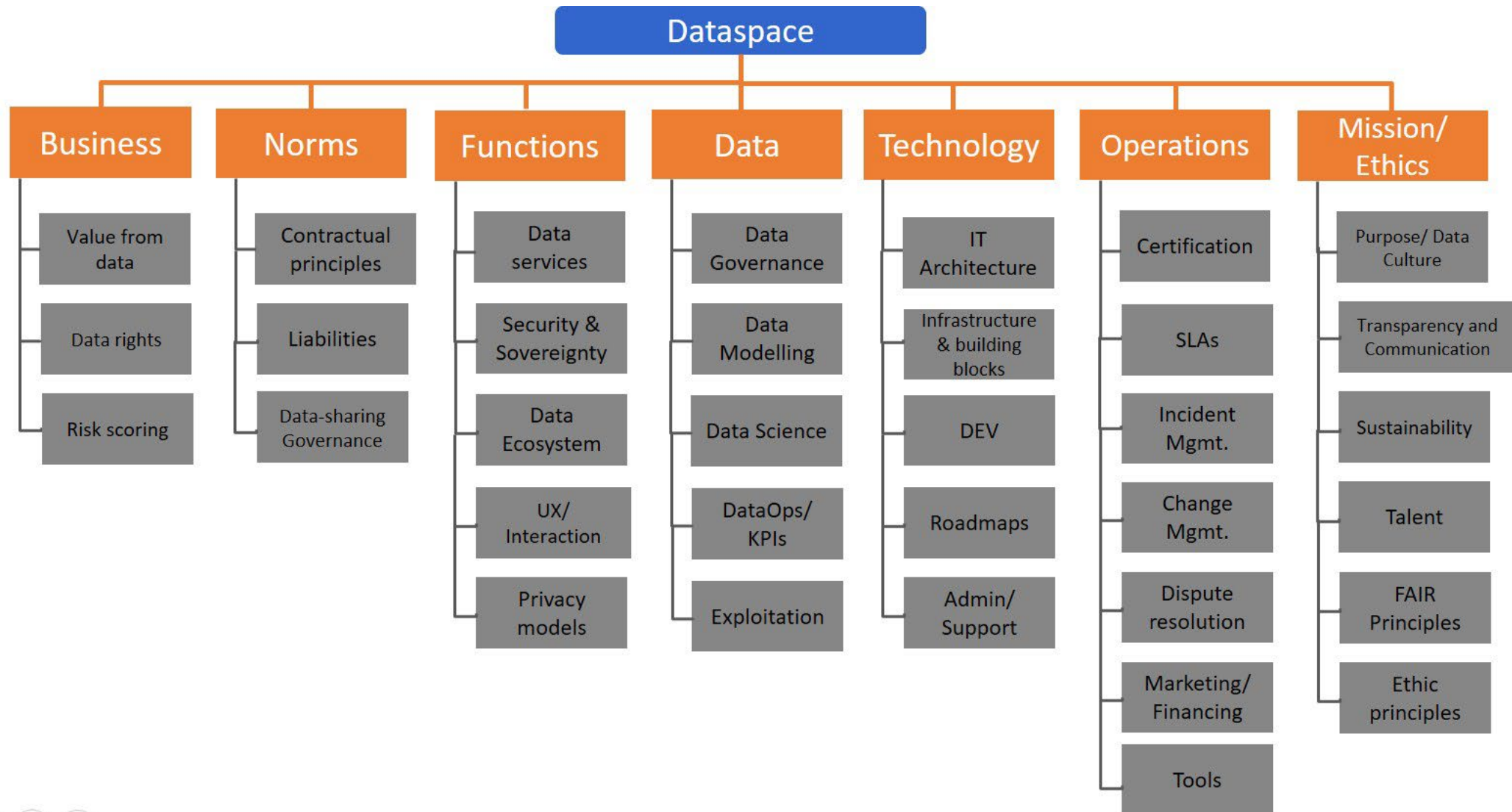


Decentralized network of  
interoperable data spaces

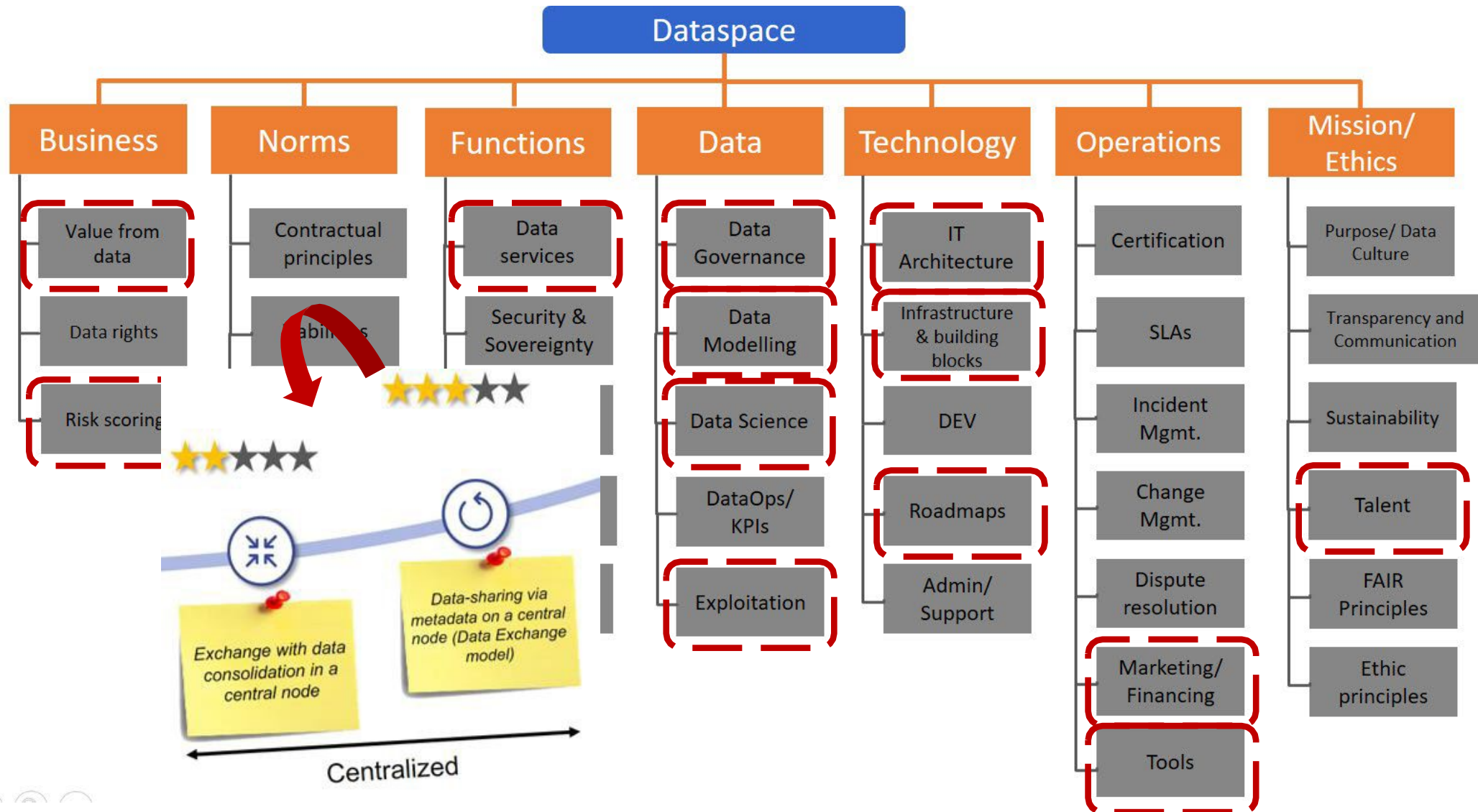




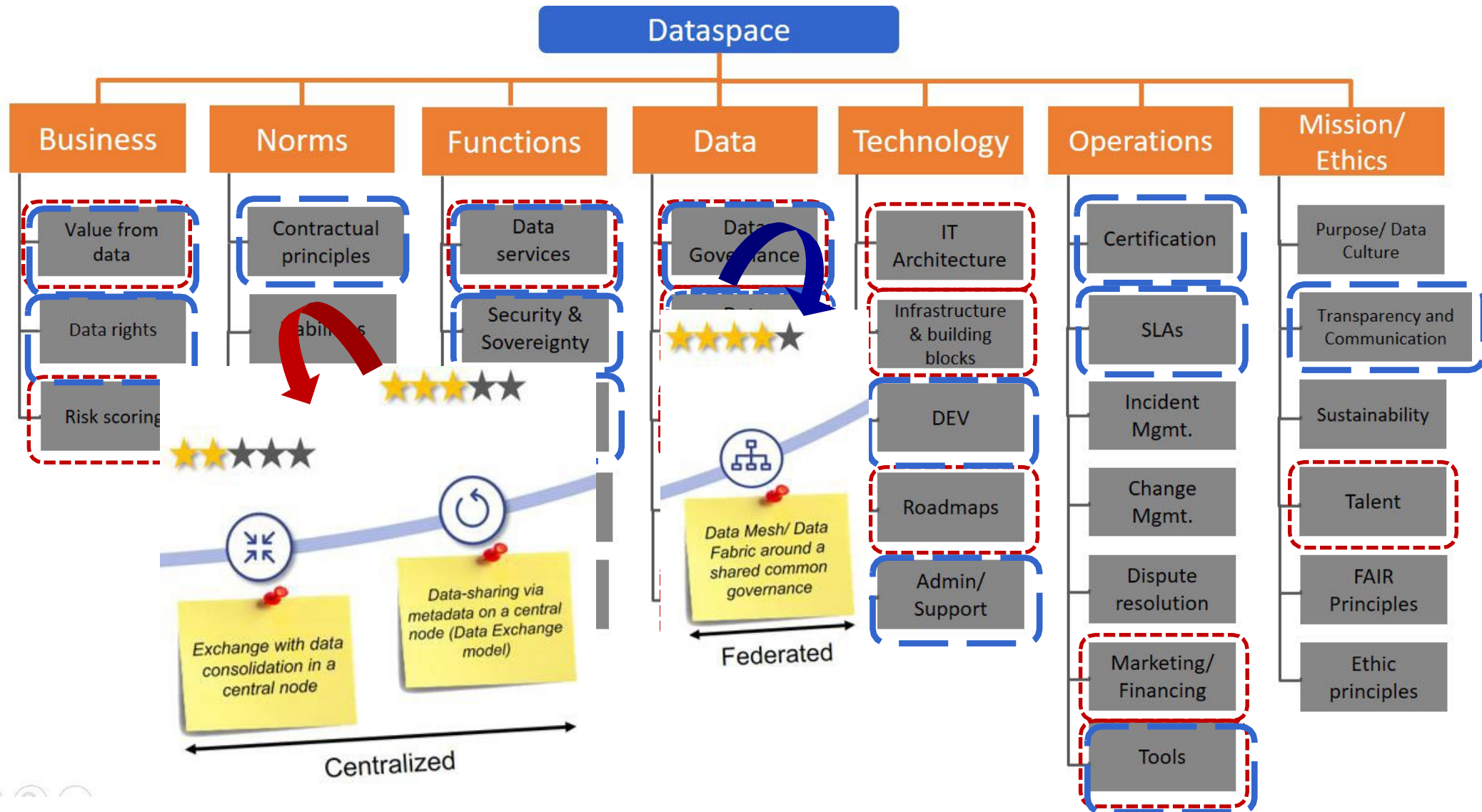
# Dimensions in data-sharing and exploitation



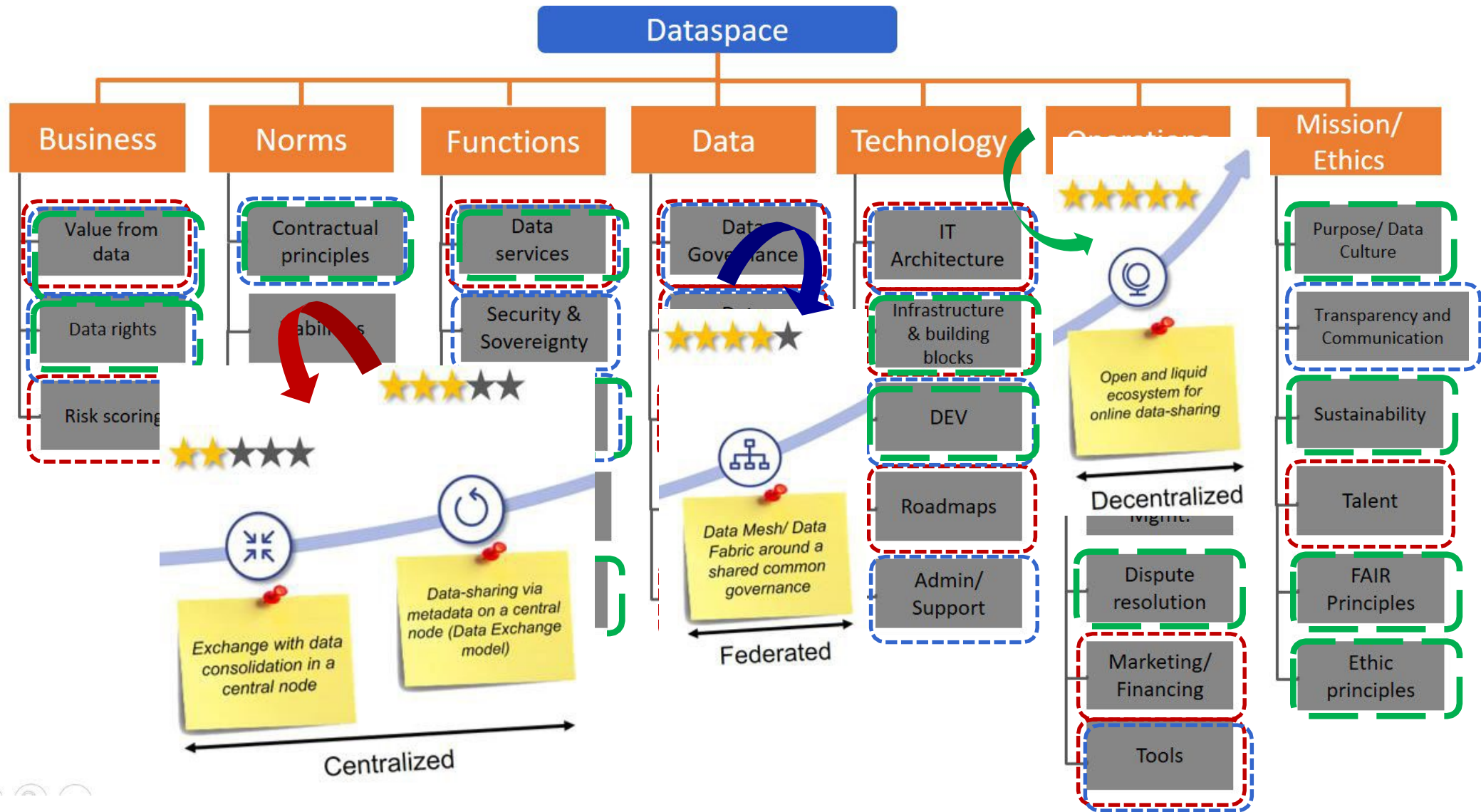
# Mapping data-sharing criteria to architectures



# Mapping data-sharing criteria to architectures



# Mapping data-sharing criteria to architectures



THANK YOU

[oficina.dato@economia.gob.es](mailto:oficina.dato@economia.gob.es)



# Setting up a roadmap



## — Jean-François Cases



Amadeus Vice-President-Associate General Counsel  
Intangibles, Data Value and R&D

EONA-X President, Mobility, Transport & Tourism Data Space

# Roadmap setup

Governance

Use cases

Technology

Strategy

Marketing / Communication

Compliance

Finance / Business Model



# Sharing EONA-X story Learnings

## Major challenges successfully met!



Early 2021, European representatives from the global Mobility, Transport and Tourism market start working together on this project.



5 founding members (ADP, AF KLM, AMADEUS, AMP, SNCF) joined by the first active member, APIDAE, created a non-profit association to promote sharing data, in compliance with European rules in the Gaia-x momentum.

1<sup>st</sup> use case: multimodality



2021: delivery of the first version of the prototype

2022 Answer to European calls for tender Digital Europe

1/« Preparatory actions for the data space for mobility» with Acatech

2/« Preparatory actions for the data space for tourism» with Anysolutions / Tecnalía



# ... and what is going on now



Real-time consumption of data from members' production systems to ensure **optimal data quality**



Development of a catalog to present the available data that members wish to exchange



Data consumer identity control and contracts



Integration of new members in the association in France and Europe

2022



Delivery of the second version of the platform

2022



Definition of Tourism driven Use Cases: e.g., eCorridor

2022



amadeus



AIRFRANCEKLM  
GROUP



AMP  
aéroport  
marseille  
provence



—  
Thank you!

Eona-x.eu



# Regulation, a critical enabler and pillar of a tourism data space



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Eric Pol, Chairman, aNewGovernance



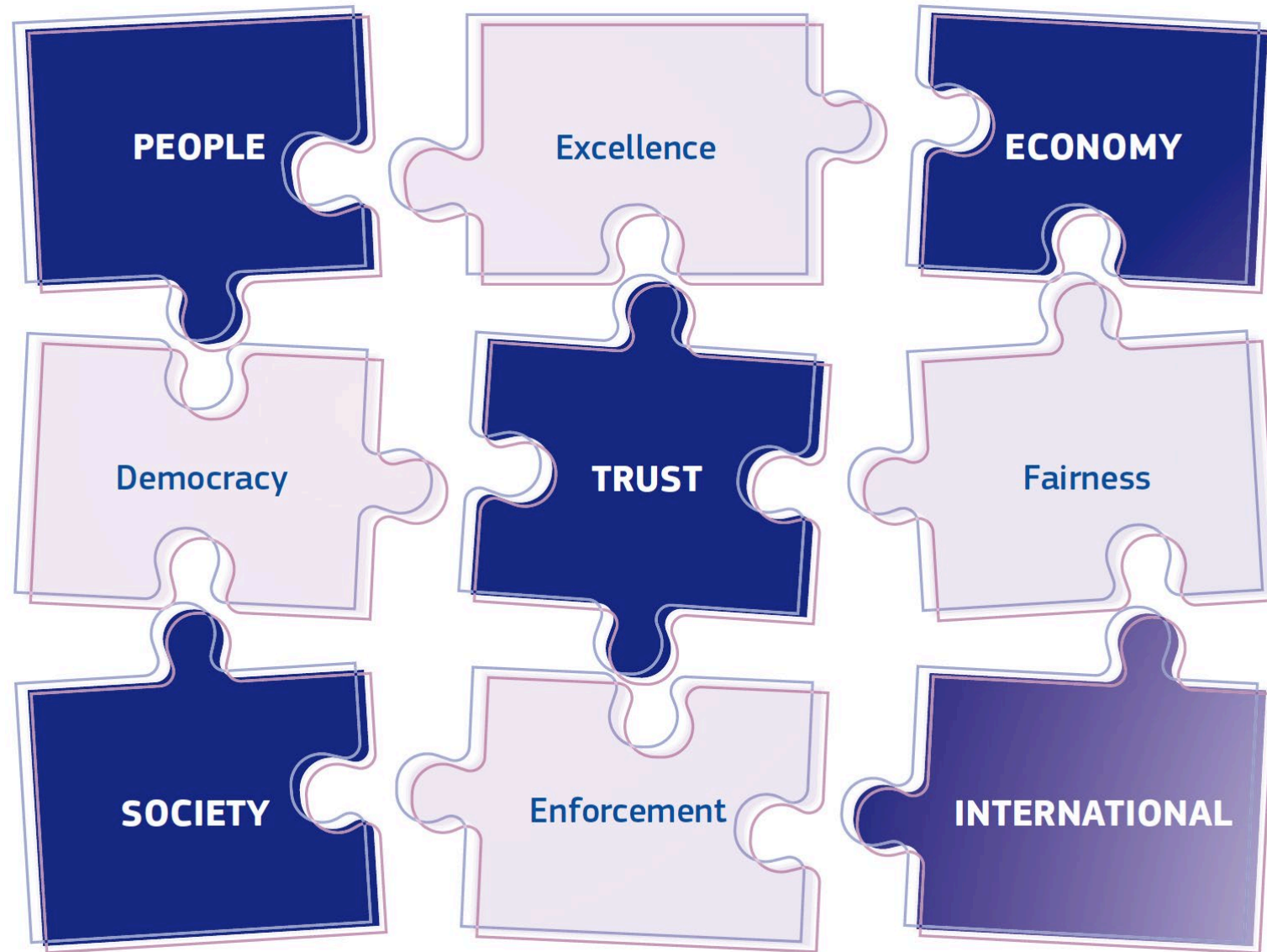
Is data the new oil?

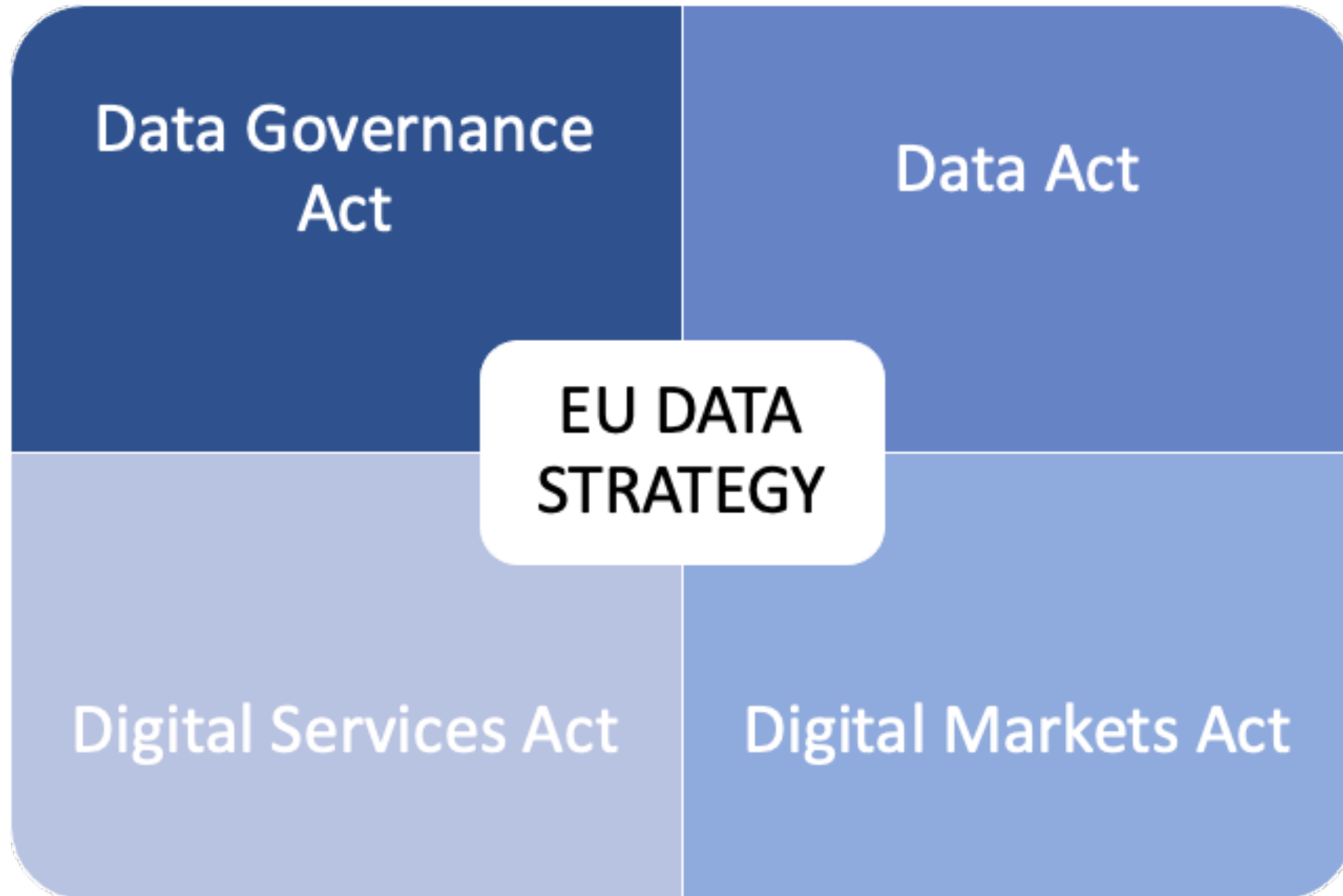


“digital technologies should enrich the lives of us all  
and respect European values”

European Commission President, Ursula von der Leyen





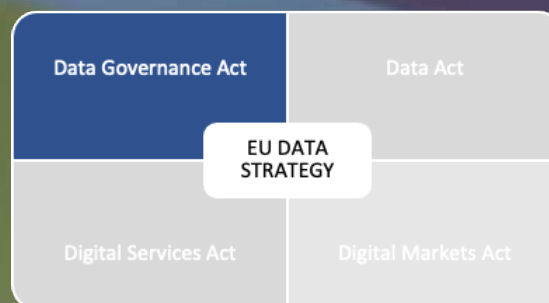




“This Regulation is a first building block for establishing a solid and fair data-driven economy. It is about setting up the right conditions for trustful data sharing in line with our European values and fundamental rights. We are creating a safe environment in which data can be shared across sectors and Member States for the benefit of society and the economy.”

Margrethe Vestager,

European Commission Executive Vice-President, A Europe Fit for the Digital Age





Facilitates data sharing across sectors and Member States,  
Creates wealth for society,  
Provides control to citizens and trust to companies.

The Data Governance Act enables the EU to boost the development of trustworthy data-sharing systems:

- Empower Europeans to decide what happens to their data, and what data they would like to share with whom.
- Facilitate data altruism to make it easier and safer for companies and individuals to voluntarily make their data available for the benefit of society.
- Enhance the reuse of public sector data that cannot be made available as open data.
- Create new EU rules on neutrality to allow novel data intermediaries to function as trustworthy organisers of data sharing.
- Set up a European Data Innovation Board to steer data governance and prioritise standards.

***Data access and reuse can:***

- generate social and economic benefits of 1% to 2.5% of GDP
- increase the annual economic value of data sharing by up to €7-11 billion by 2028
- have a wider impact on the EU economy and society as a whole



€ 1.3 trillion  
in increased productivity in  
manufacturing through  
Internet-of-Things data by 2027<sup>3</sup>



€ 120 billion  
of savings per year in the  
EU health sector<sup>4</sup>



# Pillars

- The Act encourages wider re-use of data held by the public sector bodies, including personal data through (tech mentioned: differential privacy and creation of synthetic data)
- Licensing regime “data intermediaries”. to ensure their independence and restrict their re-use of data and metadata. The requirements will affect those offering data marketplaces and (possibly) consent management platforms. Threat for Ad-tech companies.
- Data altruism encouraged to facilitate access to more quality data for Research.
- Restriction of transfers of non-personal data to third countries. Data intermediaries will need to assess if third countries offer appropriate protections for non-personal data.



# Intermediation

- Chapter III encourage a new market in neutral data intermediation services. *This is on the basis that, “specialised data intermediation services that are independent from data subjects and data holders], and from data users could have a facilitating role in the emergence of new data-driven ecosystems...”*.
- Data intermediation services are services which aim to establish commercial relationships, for the purpose of data sharing, between an indeterminate number of data holders (or data subjects) and data users. These commercial relationships could be established through technical, legal or other means. The concept is limited to pure facilitation of data sharing. *Browsers and email service providers and account information service providers under the PSD2 Directive are also excluded. However, data marketplaces are specifically mentioned as a type of intermediation service.*
- Intermediation services could also include services set up to intermediate between data subjects who want to make their personal data available, and data users who want to use such personal data. *But service provider offering services to data subjects must “act in their best interests” when facilitating the exercise of their rights, in particular in providing information about the intended uses of data (and any uses of consented data outside the EU). The Act also anticipates the creation of specialised forms of data intermediaries, “data co-operatives”, which are – in effect – owned by the data subjects they represent and whose principal objective is to support data subjects in exercising their rights.*
- Upcoming Commission logo informing “provider of data intermediation services recognised in the Union”.
- Art.11 : ensuring independence. Intermediation services have to be offered by a separate legal person (i.e. not offering other services); separate use of the data is prohibited; pricing cannot be linked to take up of other services; metadata about service use cannot be used for other purposes (but prevention of fraud/ cyber risk and service development is acceptable)
- Data intermediation services will be new types of services, tied to yet-to-exist developments in the data economy. *However, it seems possible that many existing organisations may be offering data intermediation services.*





# European Data Innovation Board, compliance and enforcement

- European Data Innovation Board, made up of a group of experts in the field, will be created. The Board should consist of representatives of the Member States, the Commission and relevant data spaces and specific sectors (such as health, agriculture, transport and statistics). The European Data Protection Board should be invited to appoint a representative.
- Member States must designate one or more competent authorities to administer the register of data altruism organisations and of data intermediaries and to enforce the legislation. These designated competent authorities must coordinate with other authorities that may have an interest, such as data protection authorities, national competition authorities, cybersecurity authorities and other relevant sectoral authorities.
- Article 31 of the Act states that fines are to be set and implemented by each Member State. Unlike the GDPR, the Act does not prescribe the specific amounts and weighting factors applicable to the corresponding monetary sanctions.
- A Data Space Support Centre will... support, but also help identify and generate synergies between Data Spaces, aggregate or develop Building Blocks and produce/evaluate Blueprints.



**"We want to give consumers and companies even more control over what can be done with their data, clarifying who can access data and on what terms. This is a key Digital Principle that will contribute to creating a solid and fair data-driven economy and guide the Digital transformation by 2030."**

Margrethe Vestager, European Commission Executive Vice-President, A Europe Fit for the Digital Age





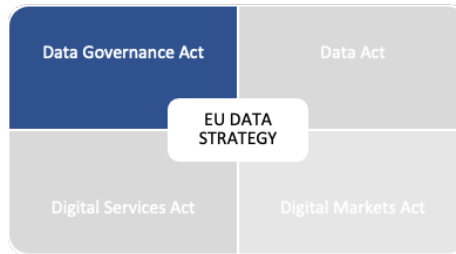
## Clarifies who can create value from data

- Lack of clarity regarding who can use and access data generated by connected products, the fact that SMEs are frequently not in a position to negotiate balanced data-sharing agreements with stronger market players, barriers to switching between competitive and trustworthy cloud and edge services in the EU, and the limited ability to combine data emanating from different sectors. This affects a range of economic sectors and leads to an underutilisation of data at EU level, with negative consequences for consumer choice, innovation and public service delivery.
- Remove barriers to access data, for both private and public sector bodies,
- Preserves incentives to invest in data generation by ensuring a balanced control over the data for its creators,
- Unlock the value of data generated by connected objects in Europe, one of the key areas for innovation,
- New rules will empower consumers and companies by giving them a say on what can be done with the data generated by their connected products,
- Possibility to transfer data to and between service providers. This should encourage more actors, including SMEs, to participate in the data economy.

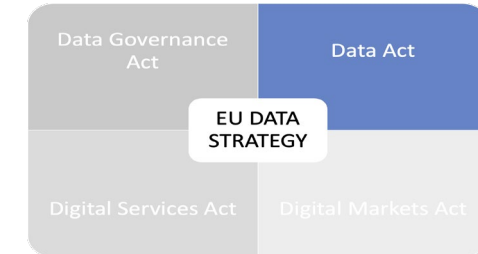
# SUMMARY



aNewGovernance



- Sets regulation framework and governance for all Data Spaces
- Introduces level-playing field and neutrality through Data Intermediaries
- Enables scale up with the industry (incumbents and new comers) through the Data Innovation Board



- Establishes the cornerstone to new business models and legal model of Data Spaces
- Governance aspects are more focused, and introduce the first framework, data access



# WHAT DOES IT MEAN FOR US?

## Industry Players

- Take back control of digital distribution channels in the face of GAFAM, Booking and others (including for small, poorly referenced local players)
- Regain some of the lost margins
- Offer a seamless end-to-end user experience
- Create interoperability and innovative use cases inc. Bundling
- Controlled monetization of data with equitable distribution of value among players
- Develop new sustainable offering and revenue streams

## Travelers users

- Seamless and enriched end-to-end user experience
- High degree of personalization
- vs. heavy advertising
- Means of controlling data circulation (based on GDPR consent)

## Ppublic actors

- Seamless user experience for the citizen, usage statistics from shared data (without going through GAFAM), use of certified state data
- Large-scale usage statistics
- Improve territorial approach (Stay/Live/Move + synergies with smaller actors and heritage sites)

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Thank you!

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# EU Code of Conduct for data sharing in tourism



Emmanuel Mounier  
Secretary General  
EUTravelTech



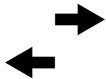
# Why do we need data sharing?



State of play of tourism data sharing



Highly complex and interconnected landscape



Lack of efficient data use

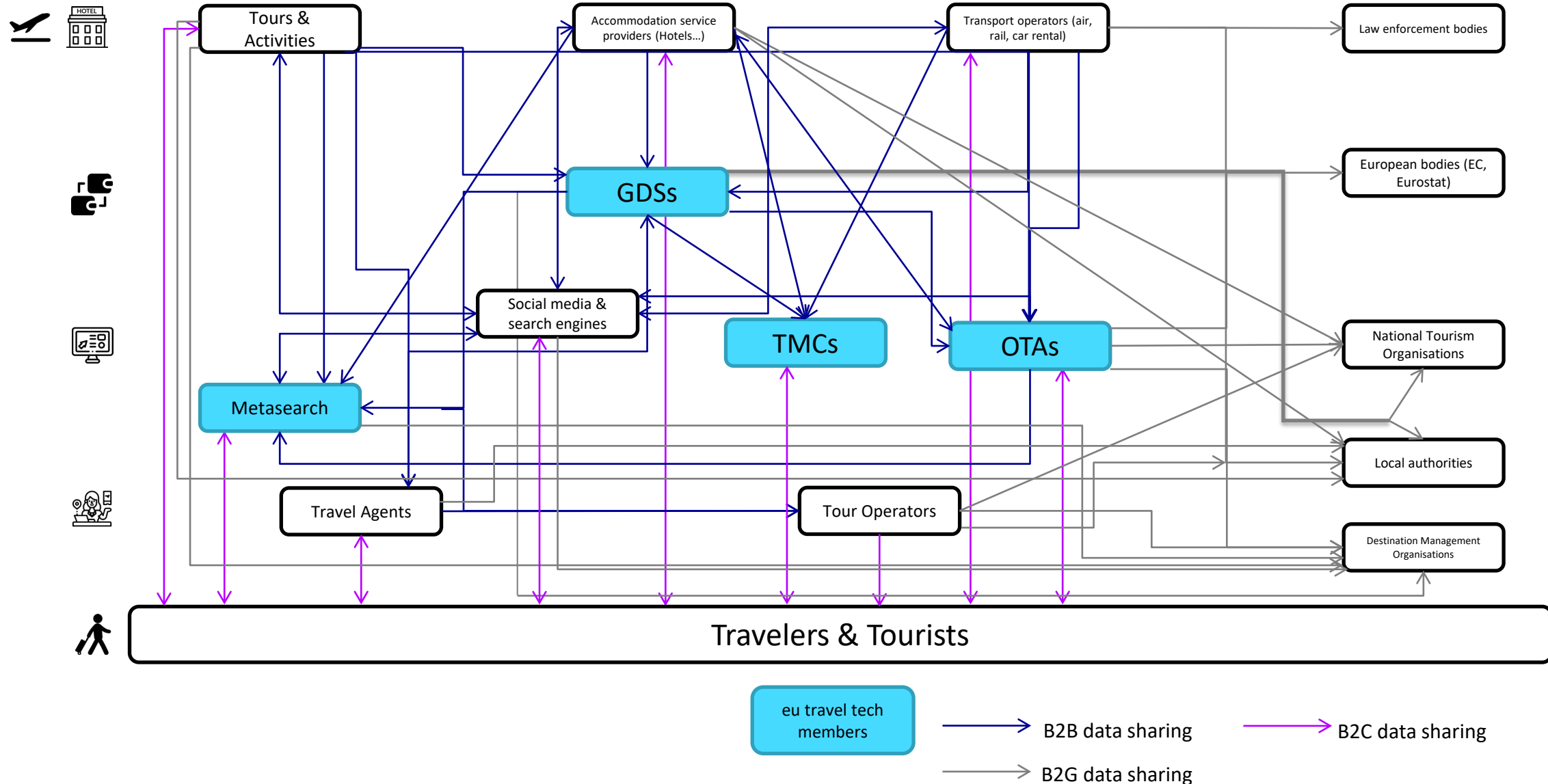


Lack of sector-wide principles and governance



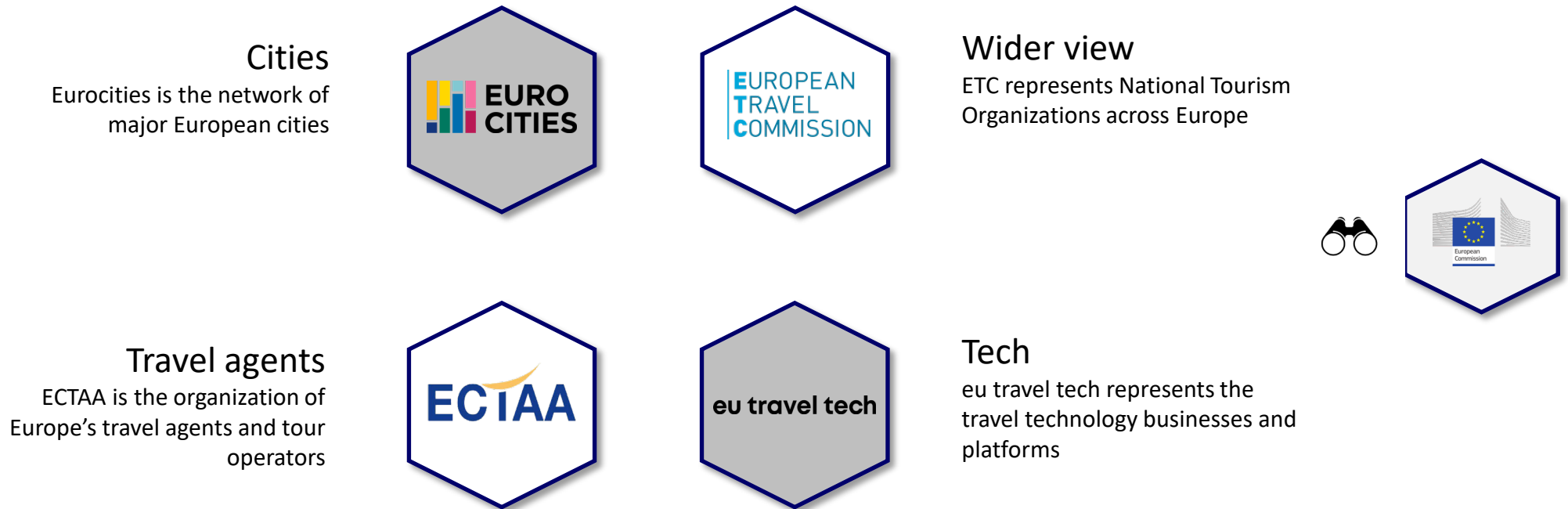
Unrealized opportunities

# Data sharing in the tourism ecosystem



# Tourism data sharing Code of Conduct

## Sector-led Drafting Committee



# What have we done so far?

The Drafting Committee has achieved:



First draft of the Code of Conduct



Consideration for institutional expertise

Ongoing work:



Ongoing expert/stakeholder consultation

The Code of Conduct is an initiative designed for the entire EU tourism ecosystem and will thus be open for participation and endorsements.

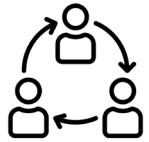


# Code of Conduct – Outline



- 1 Introduction
- 2 Goals & Objectives of the Code of Conduct
- 3 Definitions
- 4 Set of common principles for data sharing
- 5 Case studies and toolboxes
- 6 Overview of EU regulatory framework

# General objectives of the Code of Conduct



**Building trust between relevant parties to facilitate voluntary data sharing**








**Contributing to an EU-wide architecture for data exchange through common principles for tourism stakeholders**








**Ensure a level playing field for data-sharing**

# Elements addressed (I)

 Interoperability	Actors shall aim at facilitating data interoperability
 Data usage rights	Clear definition of access and usage rights of each party to the contract: data originator shall be able to determine who can access and use its data
 Remuneration	Data originator's right to benefit from or be compensated for the use of data it generated, under FRAND conditions
 Liability	Data originator's liability in case of damage arising from and/or connected to the receipt and/or use of its data (e.g. processing, analysis, enriching)
 Competition	Need to ensure a level playing field among all operators, avoid unfair data advantages and free-riding

# Elements addressed (II)

 <p>Privacy</p>	<p>CoC focuses on non-personal data sharing. Application of existing privacy legislation whenever personal data may anyhow be involved.</p>
 <p>Security</p>	<p>Need to ensure the highest feasible degree of security through a security architecture taking into account the degree of sensitivity of shared data. Protection against loss, theft, unauthorized access and alteration.</p>
 <p>Data limitation principle</p>	<p>Clear definition of data covered by the agreement. Purpose and time limitation of the access and use of the data.</p>
 <p>Intellectual Property</p>	<p>No infringement of IPRs: trademarks, protected designs, copyright, patents, trade secrets.</p>
 <p>Quality</p>	<p>Quality of data should be preserved: integrity, authenticity, consistency and accuracy.</p>

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Thank you!

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