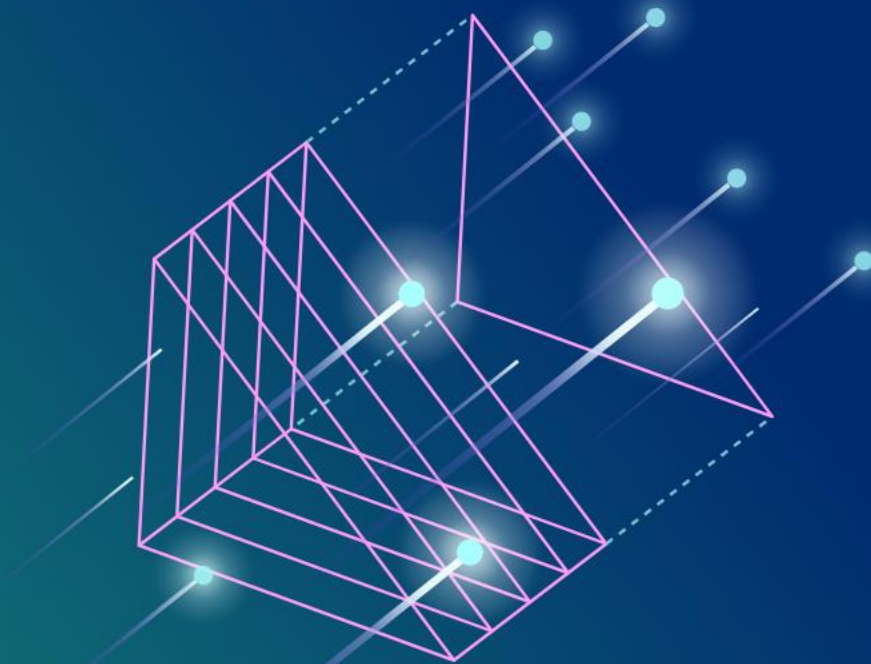


#EBDVF23

Tourism: a flagship for the data economy in Europe

Dolores Ordóñez
Director AnySolution
Coordinator DATES project



IN COLLABORATION WITH



UNDER THE AUSPICES OF



AGENDA

10:15-10:35 Introduction and setting the scene (20 min approx.)

Presentation with major statements and outlining the key outcomes of the Data Space for Tourism (Dolores Ordóñez, AnySolution & Nuria de Lama, IDC)

10:35-11:00 Data Revolution in the Tourism industry: views, case studies and challenges

(1) Antonio Sánchez (Visit Benidorm); (2) Jennifer Ruiz (Mastercard) and (3) Joan Antoni Malonda(GMV)

11:00-11:45 Panel discussion: “Disruptions, opportunities, what comes next”

(1) Antonio Sánchez (Visit Benidorm); (2) Jennifer Ruiz (Mastercard) and (3) Joan Antoni Malonda(GMV) (4) Giovanna Galasso (Intellera) (5) Txetxu Santamaría (Tecnalia) and (6) Andreas Eisenrauch (Amadeus)

11:45 Closing remarks and next steps



This project has received funding from the Digital Europe Programme under Grant Agreement No 101084007



Dolores Ordóñez
AnySolution

European Data Space for Tourism

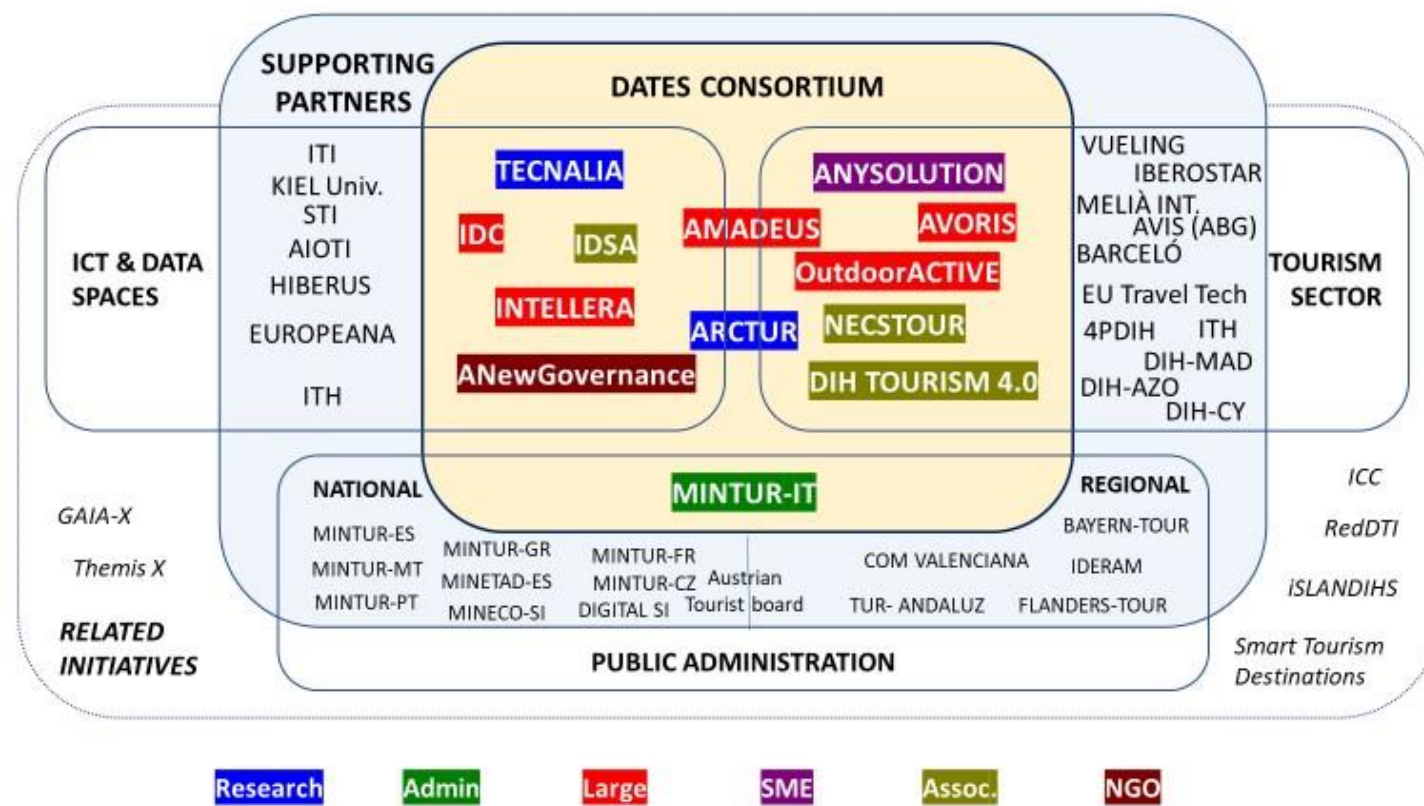


DATES

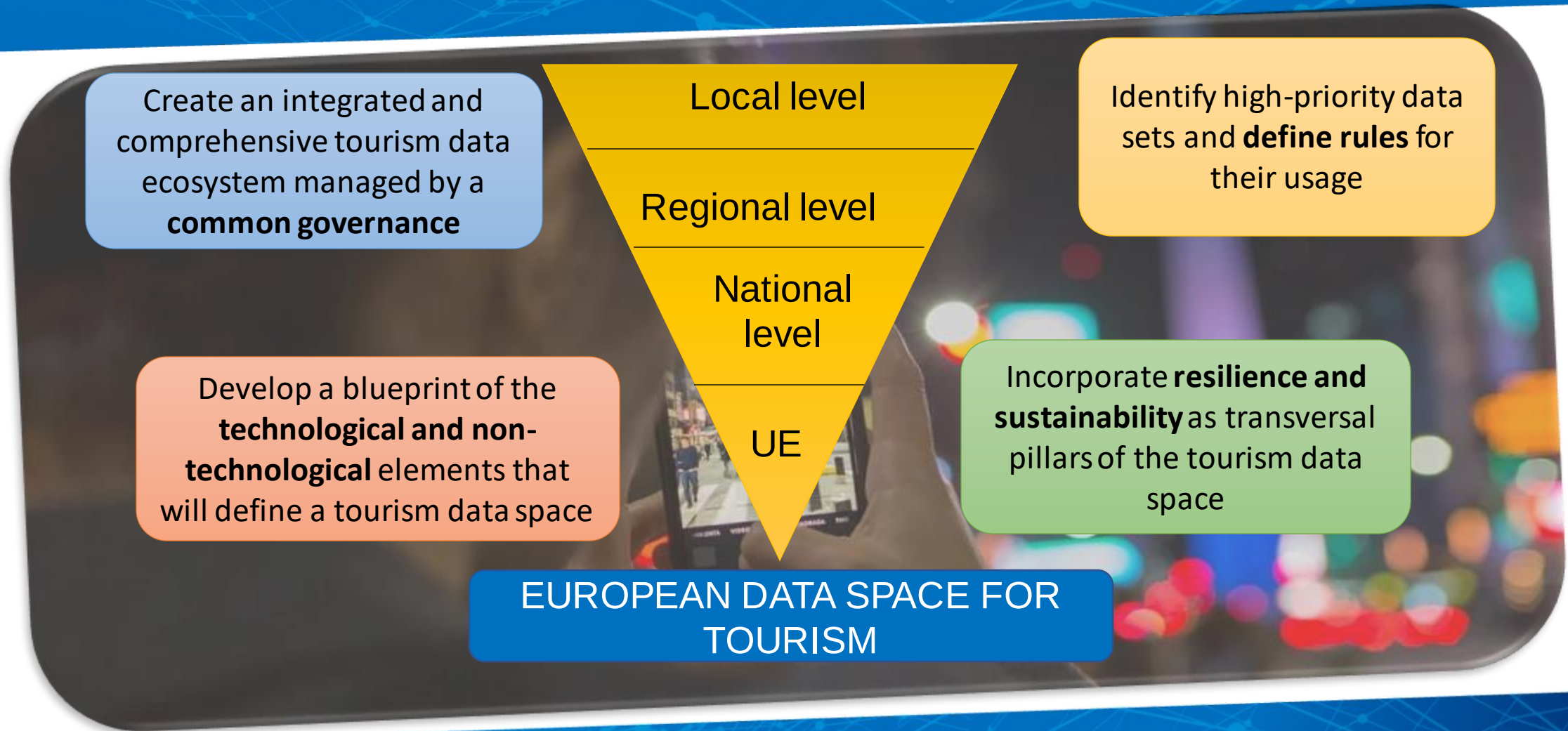
The **main objective of DATES** is to explore approaches and options for the deployment of a secure and trusted tourism data space, ensuring transparent control of data access, use and re-use

Key pillar: the digital transformation of the sector, fostering competitiveness, resilience, and sustainability

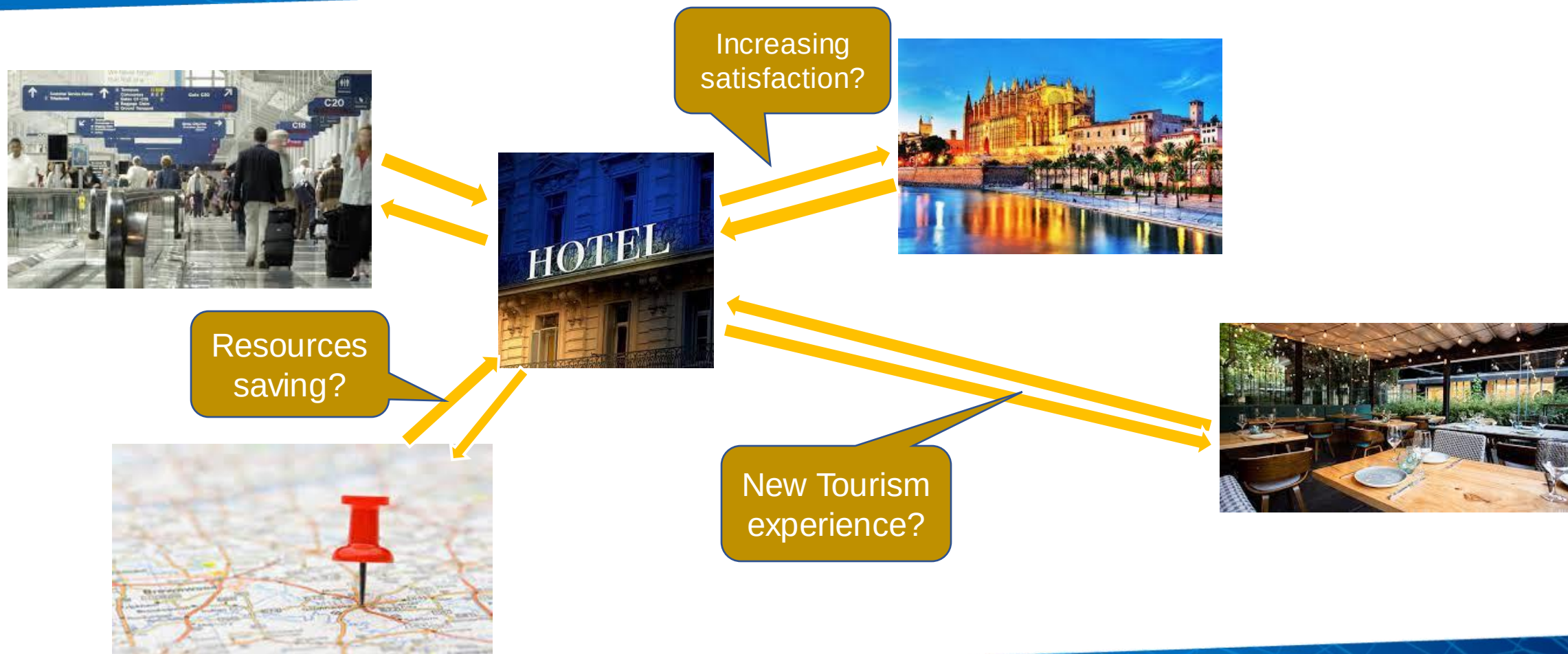
European Data Space for Tourism

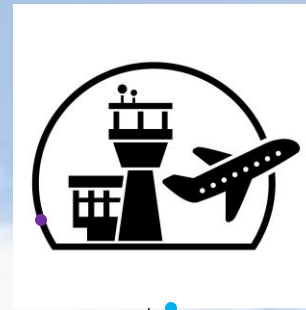
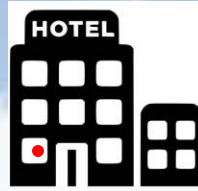


DATES



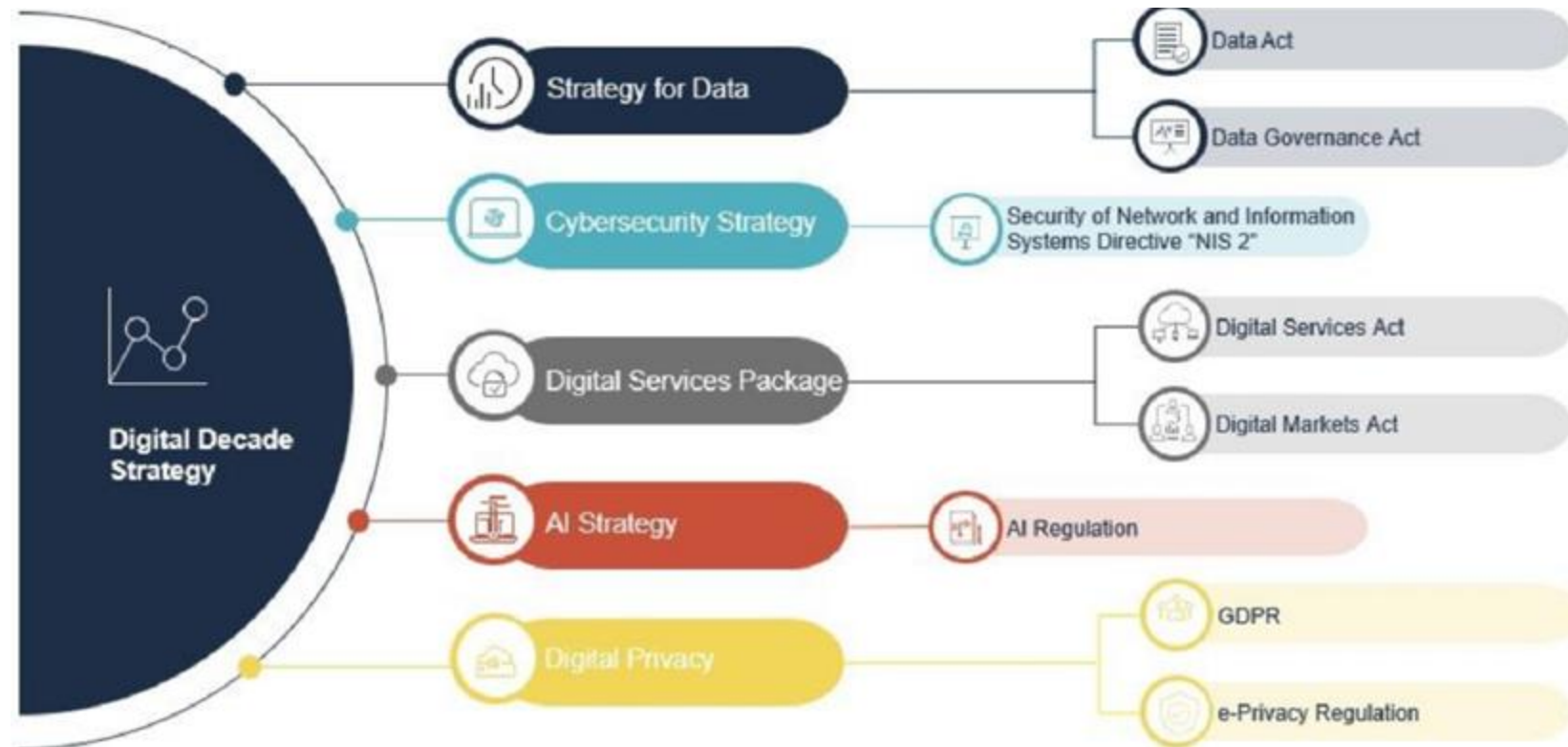
Example Use case





Data Regulatory landscape

- Data Governance Act
- Data Act
- Europe Interoperability Act
- Directive on Open Data
- GDPR
- Regulation on the free flow of non-personal data (FFD)
- Cybersecurity Act
- Digital Content Directive
- Digital Services Act
- Digital Markets Act



Source: Dechert LLP

Tourism Regulatory landscape

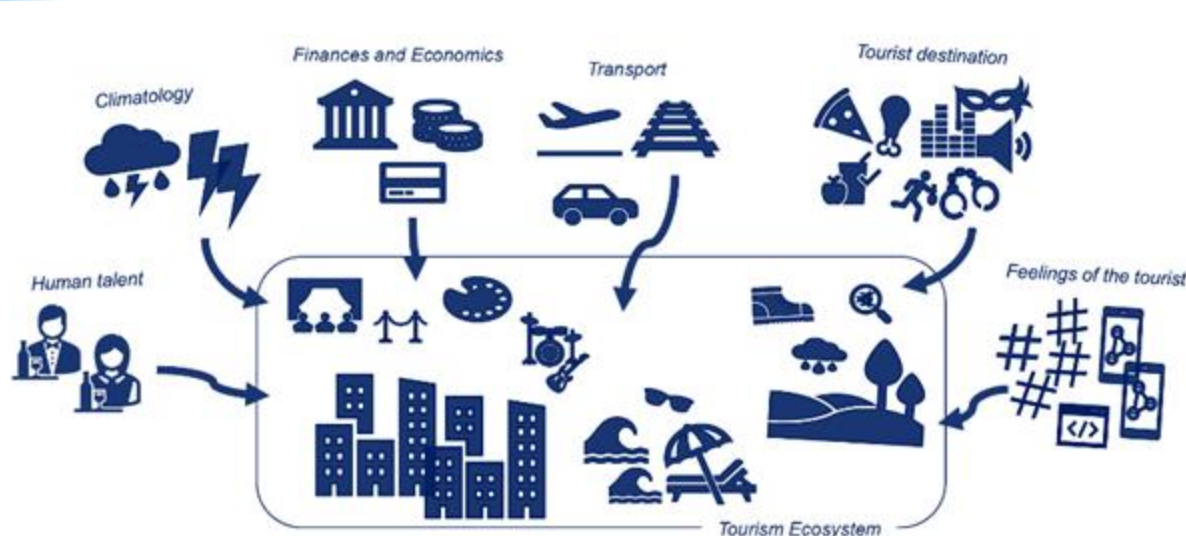
- Passenger rights
- Directive (EU) 2015/2302 on package travel
- Directive 2011/24/EU on the application of patients' rights in cross-border healthcare
- Directive 2011/83/EU on consumer rights
- Directive 2005/29/EU concerning unfair business-to-consumer commercial practices in the internal market
- Regulation (EC) Fairness in platform-to-business relations
Platform-to-Business trading practices
- Regulation (EC) No 66/2010 on the EU Ecolabel with the Tourism Accommodation



Governance setting/co-creation

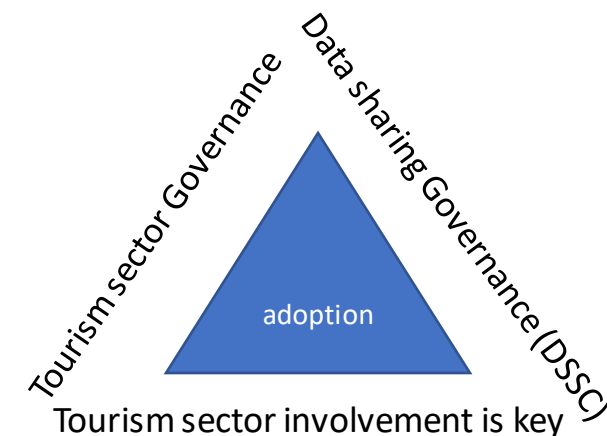
Governance for the upcoming data space will ensure it :

- Reaches its objectives
- Enables innovation
- Is future-proof
- Is inclusive and generates traction



"In Tourism, different perspectives and private and public spheres come together, and thus adequate modelling typically will involve variables beyond those of transactional or informational systems of operators"

That is why sharing data is so necessary!



From Business Centric —————> To Business networks

Review previous WP	Design alternative governance	Internal Discussion on TDS objectives	Refine Proposed Governance	Validation + support key stakeholders	Publication
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- Traceability
- Adaptability
- Resilience
- sustainability

- Business agreements
- Operational agreements
- Organisational agreements

Joint Blueprint



Joint Blueprint as Guidelines to deploy the Common European Tourism Data Space defining the key building blocks:

- Technical specifications
- Governance framework
 - Business models
- Minimum Viable Data Space based on use cases

WE'RE GOING TO SET THE BASES OF THE EUROPEAN DATA SPACE FOR TOURISM

What's next?

Dolores Ordóñez
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#EBDVF23

Tourism: a flagship for the data economy in Europe

Trends, governance and value

Nuria de Lama
IDC

IN COLLABORATION WITH



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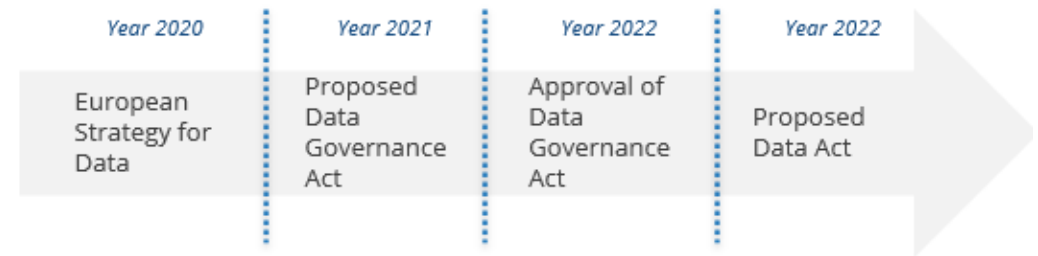
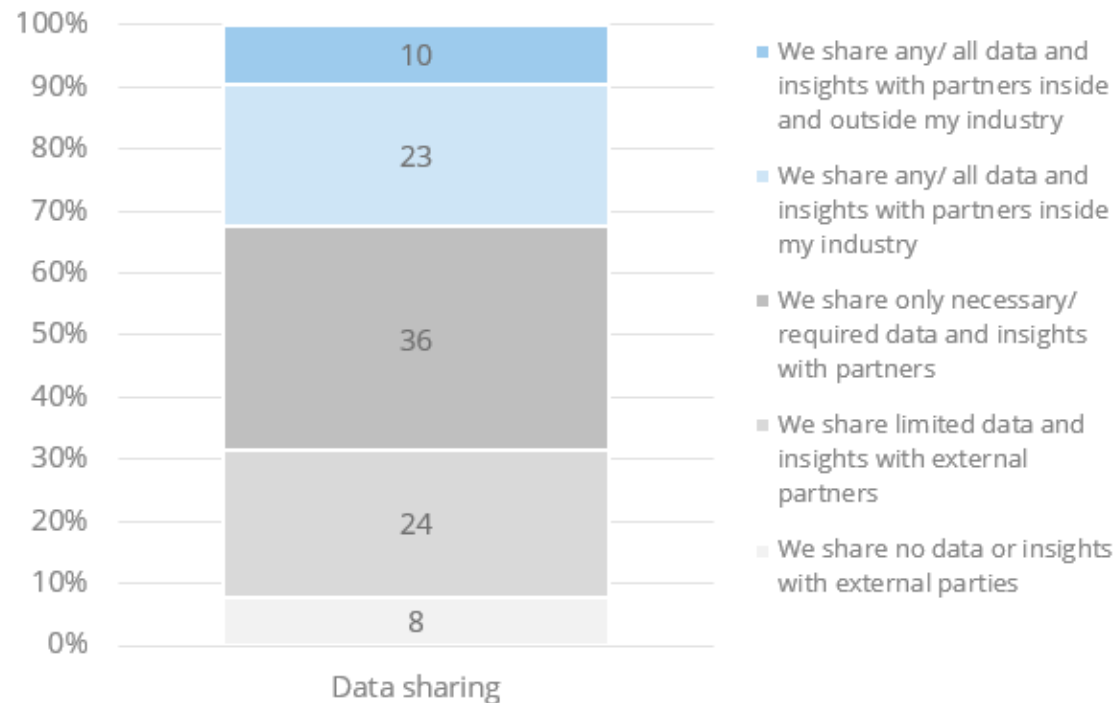


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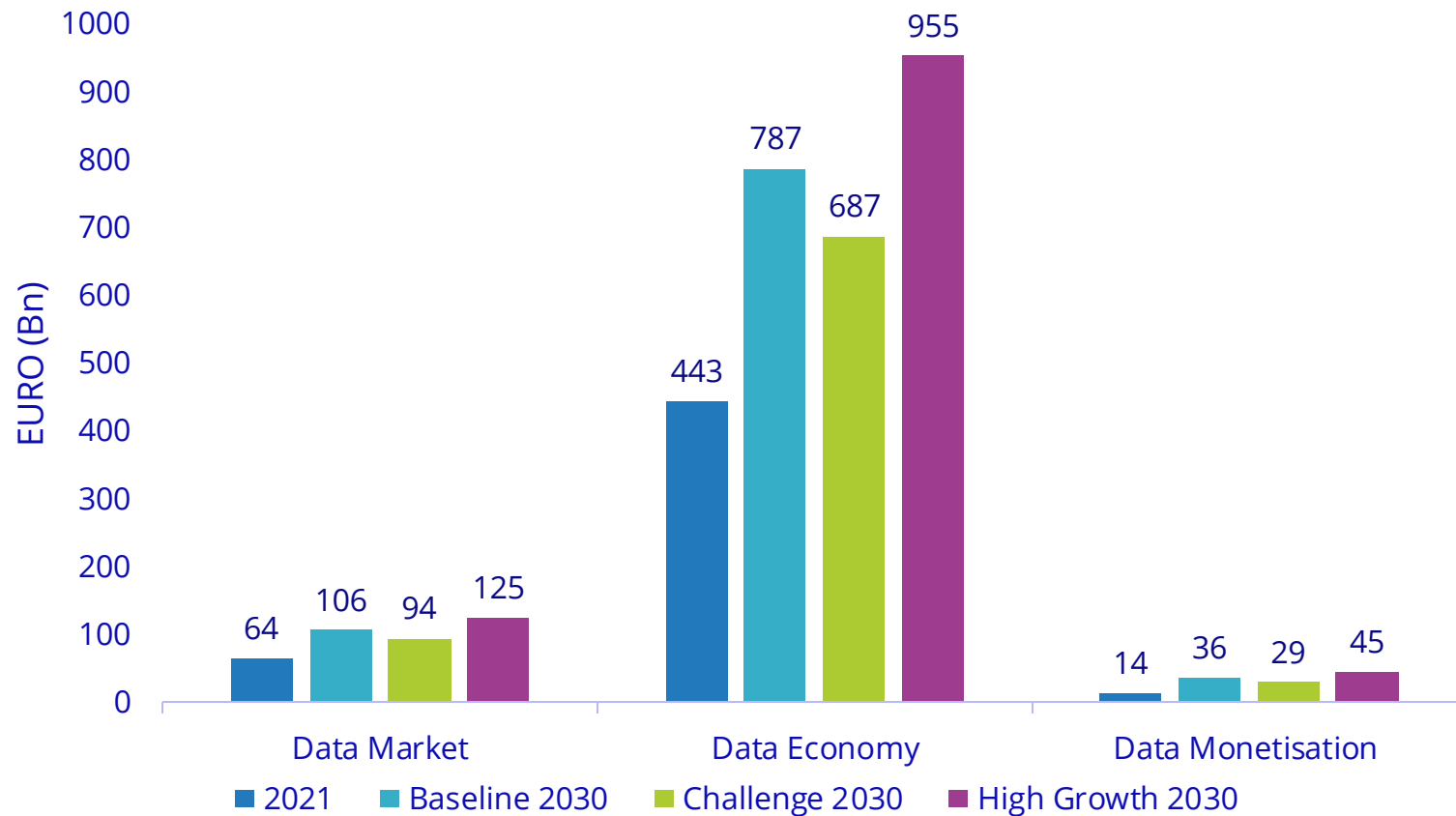
Across the globe, data sharing happens mostly when strictly necessary or mandated by law: there is a lot of untapped potential

To what extent is shared data and insights a strategy you are using to work with your Industry Ecosystem partners?



The new rules are expected to create **€270 billion of additional GDP** for EU Member States by 2028 by addressing the legal, economic and technical issues that lead to data being underused.

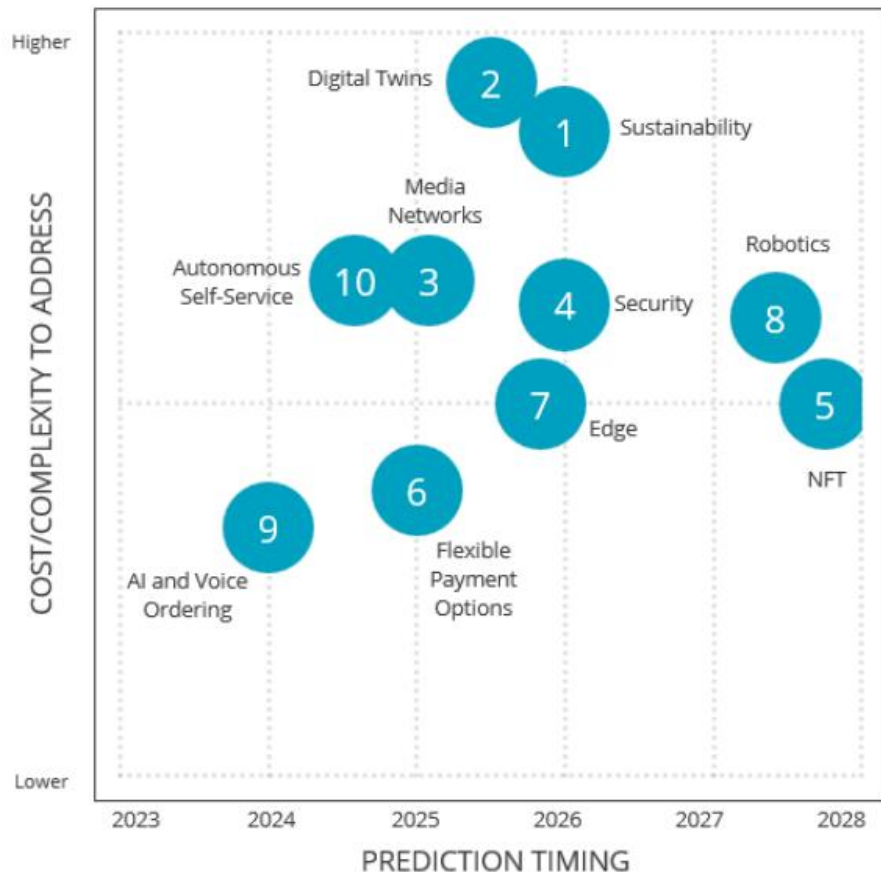
A quantitative view of the data economy



Source: EDM, IDC, Lisbon Council

Worldwide Hospitality, Dining, and Travel 2023 Predictions

Source: IDC, 2022; Top 10 Predictions



The 3 C's:

- **Customization:** Hyper-personalization will require that technology strategies involve a constant cycle of data in and insights out.
- **Convenience:** Removing friction from all guest experiences will require a blend of digital and empowered employees to deliver premiere brand interactions that will drive customer lifetime value
- **Conscience:** Consumers increasingly prefer to do business with organizations that commit to ESG goals, and employees are more likely to commit to an employer that shares their values

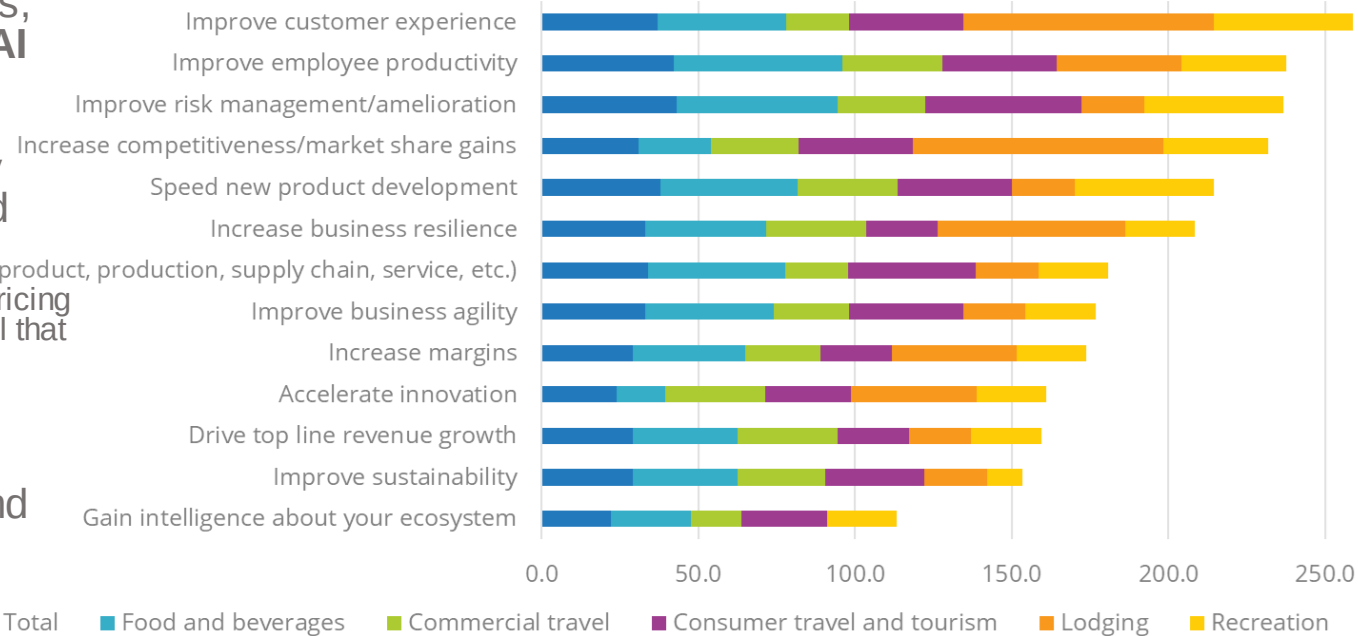
Some predictions in detail...

- (1) By 2026, 40% of enterprise hospitality and travel organizations will apply more than **25% of IT budgets to achieve sustainability-focused goals and KPIs**
- (2) Driven by labor shortages, by 2025, 50% of hospitality and travel organizations will **leverage digital twins to increase efficiency and forecast accuracy, increasing bookings by 25%**
- (7) Driven by the need for low-latency and real-time personalization, by 2025, 60% of enterprise hospitality and travel organizations will increase **spending in edge computing by 20%**.
- (9) By 2024, 50% of **interactions with hospitality and travel brands will be AI enabled** for recognition and automation, lifting profits by 15% and improving customer satisfaction by 30%.
- (4) By 2026, 45% of hospitality and travel organizations will **hire or reskill employees for cloud IT security**, reducing negative impact of breaches from a cost and time perspective by 25%

Path towards Digital Transformation: AI adoption in tourism

- Hospitality and travel organizations (including restaurants, commercial travel, lodging, and recreation) are making **AI projects central to IT investments** in order to drive business outcomes; Top drivers: improving **risk management (43%)**, improving **employee productivity (42%)**, speeding new **product development (38%)**, and improving **customer experience (37%)**.
 - Air Serbia is utilizing AI to lift ancillary revenue and utilize dynamic pricing and offers. The company partnered with Sabre for its AirPrice IQ tool that leverages Google's AI and ML toolkit
- Generative AI for CRM** has potential with its ability to streamline workflows of staff while still delivering **hyper-personalized and real-time content** across booking and sales channels
- Pressures on staffing** will continue to drive brands to invest in AI solutions to achieve business goals **as efficiently as possible**:
 - Chipotle, Taco Bell and Popeyes are already using AI voice bots at the drive thru

Primary business drivers for using AI



IDC #US50477523 (March 2023)

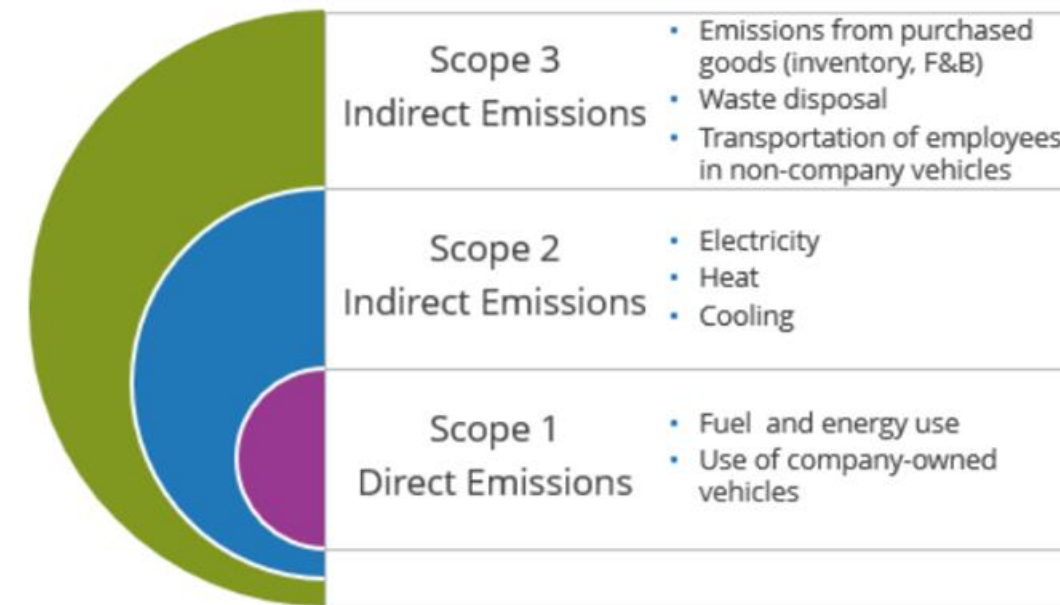
Source: Industry AI Path Survey, IDC, September, 2022, hospitality and travel n = 100

Mainstream ESG/ IT for sustainability

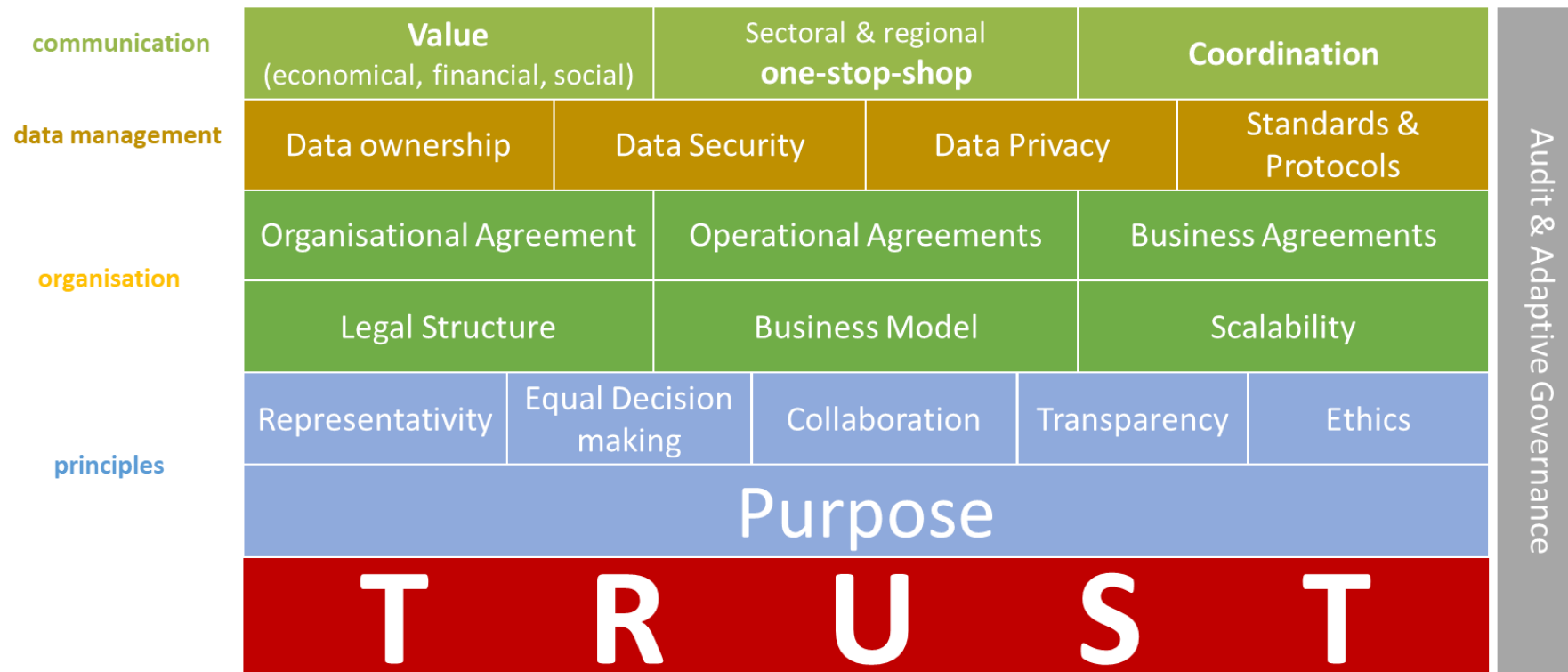
Environmental, social and governance

- ¼ companies in hospitality and travel state that sustainability is a top priority for IT investment
- The aviation industry produces approximately 2% of human-caused CO2 emissions
- Hotels contribute 1% to global carbon emissions approx. (roughly 363 million tonnes) → the hotel industry would need to **reduce its carbon emissions by 66% per room by 2030 and by 90% per room by 2050** to ensure that the growth forecast for the industry does not lead to a corresponding increase in carbon emissions
- **Carbon neutral**= scope 1 + scope 2 (internal and energy supplier sources of emissions)
- **Net-zero**= scope 1 + scope 2 + scope 3 (data sources outside the company)
- **Collection/reporting of CO2 emissions:**
 - 42% companies are not doing anything
 - 43% collect scope 1 data (internal sources of CO2 emissions) → only 28% report data
 - 7% collect scope 2 data → 7% collect and report data
 - From those that do not collect and report data on CO2 emissions, 73% say this is due to a lack of access to enough quality data to accurately assess and report on emissions
 - 18% claim lack of quality data

Identifying the Scopes of Emissions

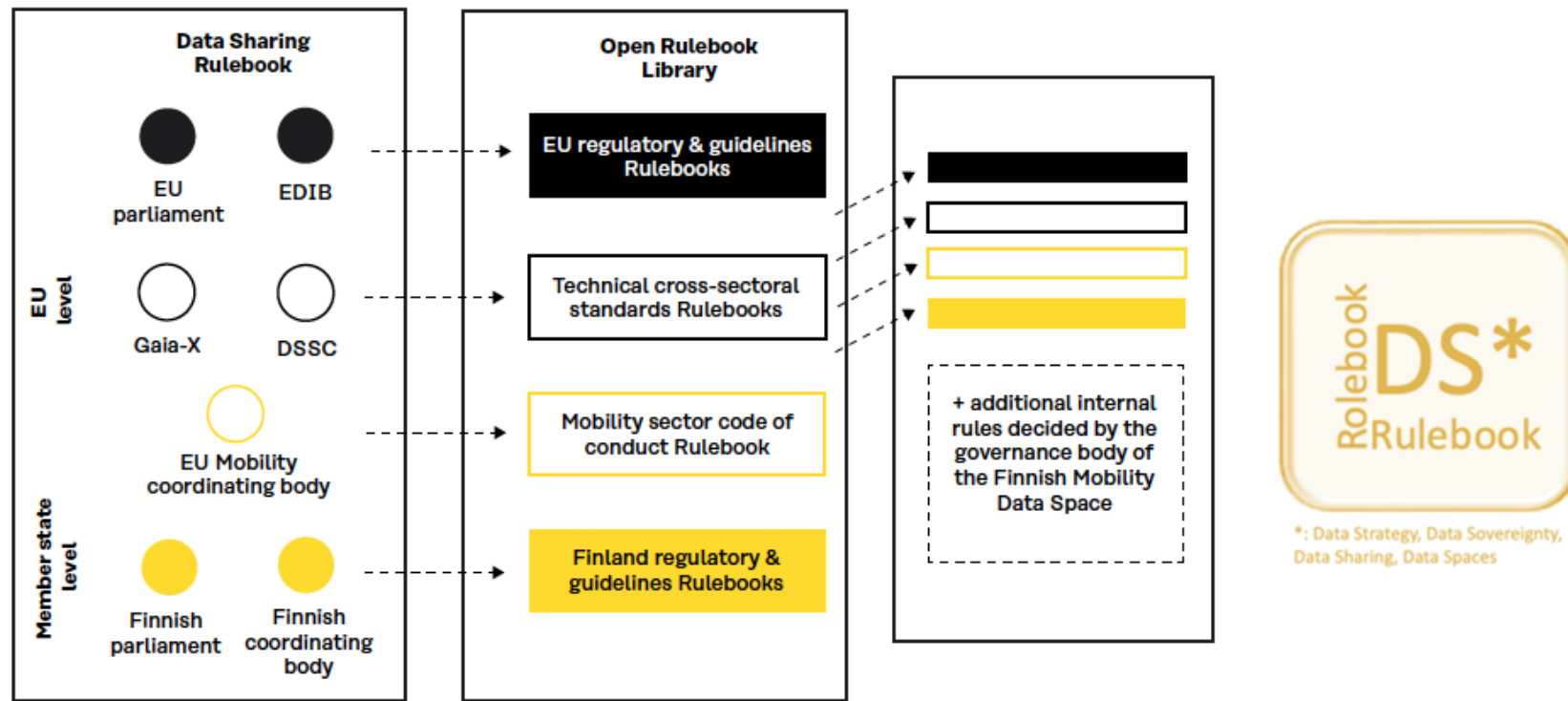


ETDS Governance Fundamentals



How do we ensure interoperability and lack of duplicates at national level

- Designing the rulebook of a data space through the rulebook & rolebook framework



More details in
Towards a Holistic European
Data Governance
Due for publication October 2023



in collaboration
with



Business models & financial sustainability

Data providers

- Freemium Access (free access to a basic version of standardized tourism data, paid when use to generate products or additional access is required)
- Participation-Based Reductions (Incentives like discounts, points, tax cuts as a result of contributions –data, services...)
- Partnership-Based Agreements (collaboration among stakeholders to achieve a common or shared goal that benefits all parties)
- (Yearly) Subscription Fee

Data intermediaries

- Data aggregation service (with subscription or pay-per-use)
- Harmonization Services (consultation/project-based fees)
- Data Analytics and Insight (subscription, custom analytics)
- Educational Services (certification programs, fees, advanced training...)
- Advanced quality assurance and certification
- Customization and Localization Services

Sustainability of the data space

- Provision of Organizational Federation Services: governance of the data space, structured integration of relevant stakeholders, development of the basic organisational and technical requirements, prerequisites and foundations of the data space, onboarding of new members, strategic linking of the data space with other data spaces.
- Models under analysis: (1) Membership fees, (2) Percentage of revenues resulting from specific activities, (3) In-kind contributions, (4) Payments based on the number of transactions or processes facilitated by the data space.

EUROPEAN
**BIG DATA
VALUE** FORUM

25-27 OCTOBER | VALENCIA - SPAIN

October 26,
2023
10:15 - 11:45

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