

UNLOCKING INSIGHTS: INTERVIEWS AND A SURVEY SHED LIGHT ON CRUCIAL ASPECTS OF THE EUROPEAN TOURISM DATA SPACE

The DATES project reached significant milestones by **distributing a comprehensive survey and conducting targeted interviews** during its lifecycle. The Project Team embarked on these data-gathering endeavors to gain valuable insights, diverse perspectives, and firsthand experiences from key stakeholders and industry experts of the tourism and data ecosystems.

In line with the purpose of producing **an accurate and up-to-date mapping of data sharing initiatives in the tourism sector**, two data collection methods were used: desk research for mapping existing data sharing initiatives, and a survey to investigate whether some existing data sharing initiatives were missed by the desk research. The survey's opening period was December 15th, 2022, up until the 16th of January 2023, and also encompassed a set of questions to investigate which data are needed by the sector and to collect the contacts of stakeholders interested in the project's next consultations.

Overall, **209 survey replies** were collected, and respondents represented a wide range of categories of stakeholders ranging from small and medium enterprises, start-ups, NGOs, research institutions and universities, public authorities and more. The respondents covered 24 EU countries and 10 extra-EU countries. The survey was disseminated through the Consortium partners' network of tourism stakeholders, and through the DATES website and social media accounts, allowing the Team to reach a wide European audience in a multitude of languages.

The survey revealed compelling results, allowing to **identify additional 36 data sharing initiatives**. Out of all respondents, **129 declared to be aware of data sharing initiatives**, while **87 stated they used data sharing initiatives**. Moreover, the purposes for which data exchange is most needed in the tourism sector are to conduct market analysis and inform decision making, and to improve planning and operations of tourism services. Conducting market analysis and informed decision-making implies a higher availability of data and improved data analytics capabilities, whilst improving planning and operations of tourism services implies understanding and possibly predicting tourism patterns through data, which can ultimately help improve the overall efficiency and competitiveness of the tourism ecosystem. The same two data purposes were also uncovered to be the most frequent goal tackled by data sharing initiatives known by respondents. Moreover, from 87 respondents who used a data sharing initiative, it was revealed that 36% of the data sources accessed through these initiatives were Other data (including private business datasets, statistics and context-specific information) followed by transaction data (26%), device data (20%) and user generated data only 18%. Moreover, transaction data and user-generated data are considered the most important sources of data to be exchanged in the tourism sector. The survey further helped to **identify shortages in the known/used data sharing initiatives**. The respondents most frequently mentioned problems such as **inaccuracy/superficiality of data, low quality and granularity of data and incomplete metadata**. The second most frequent type of answers refers to the **lack of data interoperability**. Answers related to the **lack of digital and data analytics skills of the sector's workforce, which ultimately prevent a meaningful exploitation of the value of data**, are the third most frequent types of shortages mentioned. Fourthly, the **lack of cooperation and coordination for sharing data in the tourism sector, as well as data not being updated in a timely manner**, were mentioned. Lastly, answers pertaining to limited data access, implying

insufficient initiatives for sharing tourism data and consequently limited data availability were cited. At the same time, the results of the survey highlight that data on demand and offer, sustainability, mobility, and behavior of tourists are currently missing.

In addition to the survey, through March up until April, the Project Team conducted **29 in-depth interviews** with data sharing initiatives, including three data spaces. By leveraging experience of the initiatives and data spaces, the Project Team gained firsthand insights and nuanced perspectives on their **datasets, business model, governance and technical structures**, and how they **solve data needs/problems of the tourism ecosystem**. Moreover, the interviews helped in the **identification and development of a list of use cases** relevant for the tourism data space that has been further explored during the use case co-creation workshop that took place on the 28th of March. The interviews with the three data spaces were further needed to define a list of specifications for each of the **building blocks** that are considered relevant for the upcoming tourism data space.

In relation to the issues concerning data, the interviews have confirmed numerous previous findings. Respondents have identified several primary challenges, such as **data fragmentation, data interoperability, data quality, and granularity**. However, it should be noted that the barriers to data sharing extend beyond these data-related characteristics. The **sector's limited digitization, insufficient data analytics skills, and the absence of a sharing culture** also impede data exchange within the industry. Regarding governance, the interviews reveal that various business models are being considered, including freemium-pay-per-use models and freemium models with charges tailored to customers' specific needs. In terms of legal entities, the majority of analyzed initiatives consist of associations of SMEs and DMOs, non-profit associations, and research consortiums. The technical requirements adopted vary depending on the nature of each initiative. However, **many initiatives utilize standardized formats** for data downloading and employ APIs for data retrieval and exchange. The more advanced initiatives incorporate additional features such as automated data harmonization, duplicate data management, ETL processes, scoring algorithms, and the integration of diverse applications such as chatbots, data lakes, and artificial intelligence.

The findings from the survey and interviews will form an essential foundation for the tourism data space future endeavors. The comprehensive data and insights collected will ensure that the project's outcomes align with the needs and aspirations of the tourism industry.

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