



Webinar: Space for tourism

26 January 2022 | 11:00 CET

Davide Coppola, Mina Syriou | [European Space Agency](#)

Elena Cholakova | [World Tourism Forum Lucerne](#)

Ana Agostinho | [Mirpuri Foundation](#)

Martina von Münchhausen, Alfred Schumm | [WWF](#)

Paras Loomba | [Global Himalayan Expedition](#)

Katerina Saridaki | [CapsuleT](#), [Hellenic Chamber of Hotels](#)

Steven Valcke | [Visit Flanders](#)

Thomas Landis | [Andermatt Swiss Alps AG](#)

Laurent Queige | [Entertainment Cluster & Welcome City Lab - Paris&Co](#)

Webinar's hosts



Davide Coppola

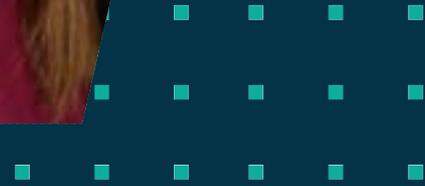


Business Applications & Partnerships

Partner-led & Thematic Initiatives
Downstream Business Applications
European Space Agency



Mina Syriou



Agenda

1. Introduction
2. ESA Space Solutions
3. 'Space for tourism' call
4. Our guest speakers
5. How to Apply
6. Q&A

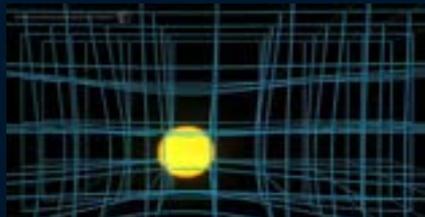


ESA UNCLASSIFIED



ESA's 4 main pillars

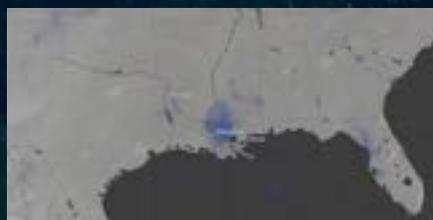
Science and Exploration



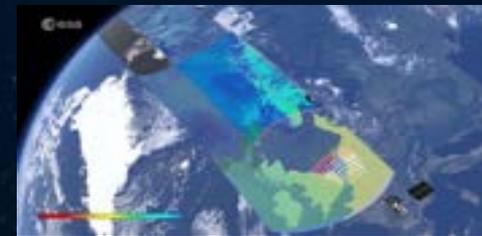
Enabling and Support



Safety and Security



Applications



ESA Space Solutions

The largest space innovation network in the world

- The **go-to place** for great business involving space to improve everyday life.
- Supporting European start-ups and SMEs to develop businesses **using space technology and data**.
- Offering **funding, business and technical support** to help to generate successful business and create jobs.



What we offer 1/2



- 

Zero-equity funding (from €50k to €2M+ per activity)
- 

A personalised ESA consultant
- 

Technical support and commercial guidance
- 

Tailored project management support
- 

Access to our international network of ESA and partners
- 

Access to our network of investors
- 

Credibility of the ESA brand



'Space for tourism' call

Space for Tourism

Home » Funding » Space for Tourism



Image credit: Lithiumphoto

OPPORTUNITY	Intended Tender
ACTIVITY	Feasibility Study, Demonstration Project
CLOSING DATE	31 March 2023

OPENING DATE: TBC SOON. CLOSING DATE IS TENTATIVE

Opening date: March 2022

<https://business.esa.int/funding/intended-tender/space-for-tourism>

Supporting tourism & travel industry in their transition to the “new normal”

Our goal is to support business innovation towards responsible, sustainable and accessible tourism

HOW? By...

- Increasing/ supporting competitiveness of tourism sector
- Increasing its resilience against environmental/ health/ other factors
- Helping the sector embrace new business models required in post COVID-19
- Ensuring sustainable growth (i.e., environmental protection & conservation)
- Using tourism as catalyst to sustainably and responsibly support rural communities upliftment



Key focus areas

1. Use of **digital and connectivity solutions** to help the sector embrace new business models required in post-COVID 19
 - Unmanned transport (automation & robots)
 - Rural tourism
 - Everywhere connectivity to travellers
 - Active engagement with rural communities
2. Seamless travel
3. Safe travel
4. Guide investments and measuring impact
5. Drive Sustainable Tourism Development



The power of space



Satellite Communication (SatCom) - SatCom is essential to ensure global communications for any of the above data services enabled by SatNav whenever the terrestrial communications are absent or not reliable. SatCom may be used also to provide broadband Internet access via WiFi hotspots to enable mobile immersive applications.



Satellite Earth Observation - SatEO data (both SAR and optical) can be used to monitor and plan infrastructure (e.g. buildings, road network, parking lots, airports) as well as identifying visitors' patterns. SatEO can also be used to monitor land cover changes over time (e.g. in both rural and city level, wild habitats, forest, land, water, etc.).

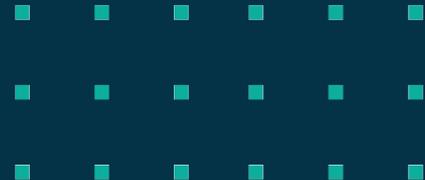


Global Navigation Satellite Systems (GNSS) - SatNav is essential to track and trace tourists and search and rescue teams. SatNav can also enable visitor flow-monitoring and location-based services to geo-localise points of interest in the tourist maps and to enable geo-fencing and time-fencing features. In addition, GNSS receivers and sensors can be installed in the tourist sites to be used as complementary ground surface deformation measurement points to EO data.

Guest speaker #1

Elena Cholakova

Head of Innovation Projects
World Tourism Forum Lucerne (WTFL)





world tourism forum lucerne
**mandate on
innovation**

ELENA CHOLAKOVA, HEAD OF INNOVATION PROJECTS
ELENA.CHOLAKOVA@WTFLUCERNE.ORG
WWW.WTFLUCERNE.ORG

WORLD TOURISM FORUM LUCERNE MISSION & VISION



wtfl start-up INNOVATION camps & COMPETITIONS



**HELP SCALE NEW IDEAS &
IMPROVE CURRENT
BUSINESS MODELS**

**BRING EXPERTS & DRIVE
DISCUSSIONS AND ATTRACT
FOREIGN INVESTMENT**

**BUILD TOURISM
ENTREPRENEURSHIP
COMMUNITY**

THE CURRENT STATE OF TOURISM back to levels of 30 years ago



-73%

International tourist arrivals



Loss in export revenues from
international tourism

US\$ 1.1 trillion



International tourism could
plunge to levels of
1990s



Estimated loss in direct tourism GDP
+US\$ 2 trillion



Loss of international tourist
arrivals
1 billion



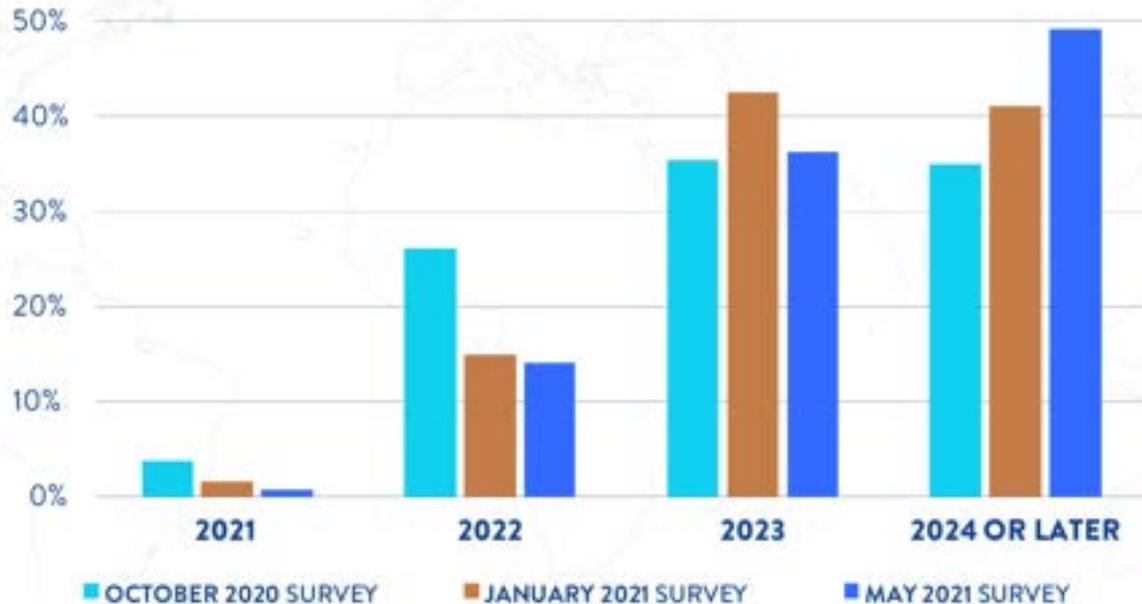
100 million
direct tourism jobs at risk

INTERNATIONAL TOURIST ARRIVALS AND TOURISM RECEIPTS

ARRIVALS -73% | RECEIPTS -64%



WHEN DO YOU EXPECT INTERNATIONAL TOURISM TO RETURN TO PRE-PANDEMIC LEVELS IN YOUR COUNTRY?





world tourism forum lucerne
THANK YOU!

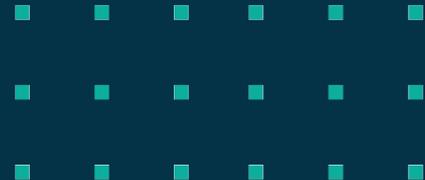
ELENA CHOLAKOVA, HEAD OF INNOVATION PROJECTS
ELENA.CHOLAKOVA@WTFLUCERNE.ORG
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Guest speaker #2



Ana Agostinho

Senior Manager - Mirpuri Foundation



SPACE FOR TOURISM

MIRPURI
FOUNDATION

FOR A BETTER WORLD

Mirpuri Foundation

THE PROGRAMS

The Mirpuri Foundation supports programs that can contribute to alleviate or correct the world's problems.



AEROSPACE
RESEARCH



MEDICAL
RESEARCH



WILDLIFE
CONSERVATION



MARINE
CONSERVATION



SOCIAL
RESPONSIBILITY



PERFORMING
ARTS





RAISING AWARENESS



SPACE FOR TOURISM



SPACE FOR TOURISM

CABIN WASTE

(2017 - Source: IATA)

- 5.7 M Tonnes;
- Est. to double in next 10 yrs;
- SDG 12: 50% reduction in food waste by 2030.

PLASTICS

(Source: Sustainable Aviation / IATA)

- 17% of cabin waste;
- Primarily water and soft drinks bottles, plastic cups, plastics straws and disposable catering equipment.







Welcome

single
use

to the
first



A Pioneering Initiative

“THE GOOD BOTTLE”

An innovative package that is 100% biodegradable and was developed for the welfare of humanity.



Aerospace Research

WINGTIP SOLUTION TRINITAIR



SPACE FOR TOURISM

MIRPURI
FOUNDATION
FOR A BETTER WORLD





MIRPURI
FOUNDATION

FOR A BETTER WORLD

Guest speakers #3



Alfred Schumm, Martina von Münchhausen

WWF Germany



Director - Innovations, Sciences, Technologies
and Solutions

Senior Programme Officer - Sustainable Tourism

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WWF

Foto: Remi Yuan,
Unsplash



WWF's Mission

We want to stop the degradation of our planet's natural environment and build a future in which people live in harmony with nature.





Why Conservation?



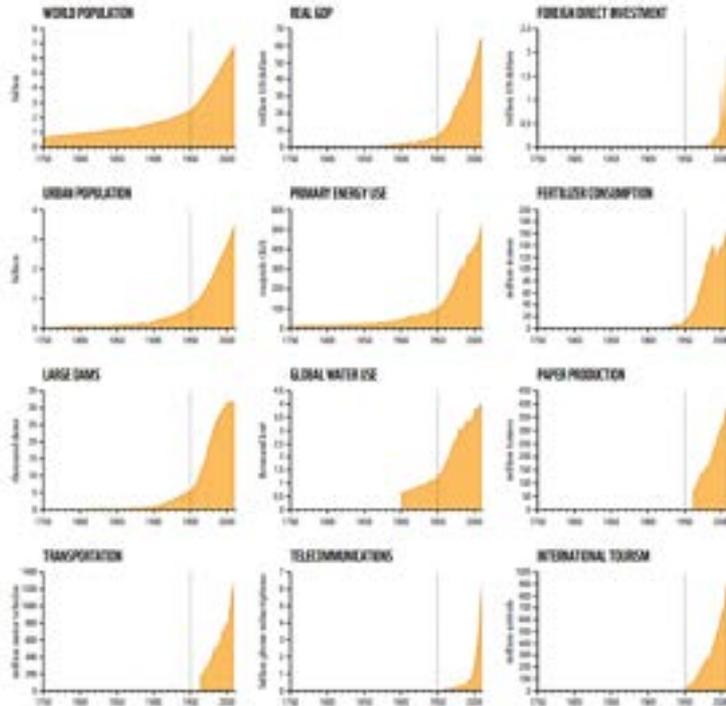
Living Planet Index: Decrease of 68% since 1970

The Living Planet Index, which measures biodiversity abundance levels based on 16,000 monitored populations of 3,038 vertebrate species, shows a persistent downward trend.

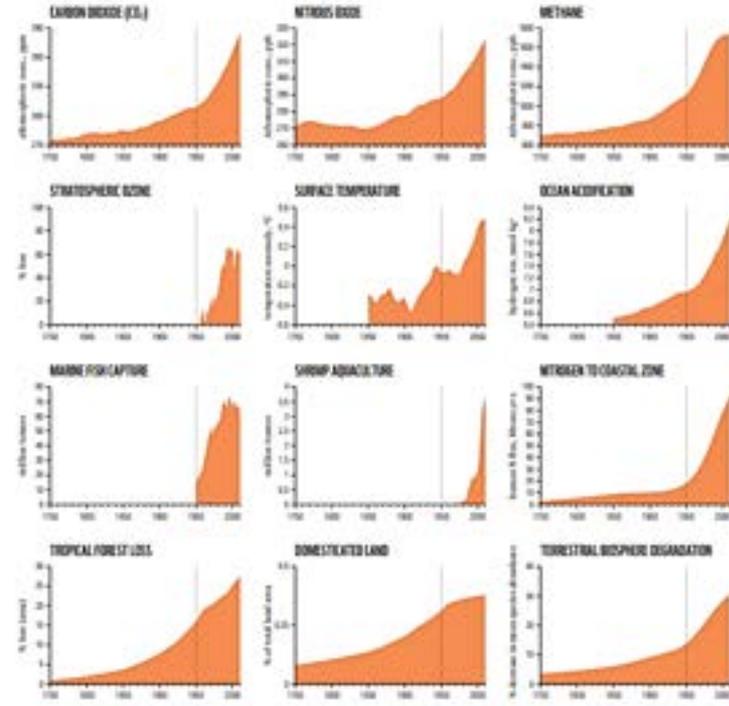
The Great Acceleration...



SOCIO-ECONOMIC TRENDS



EARTH SYSTEM TRENDS



Source:

WWF (2018): „Living Planet Report“, p. 24-25



WWF International



1961

Foundation

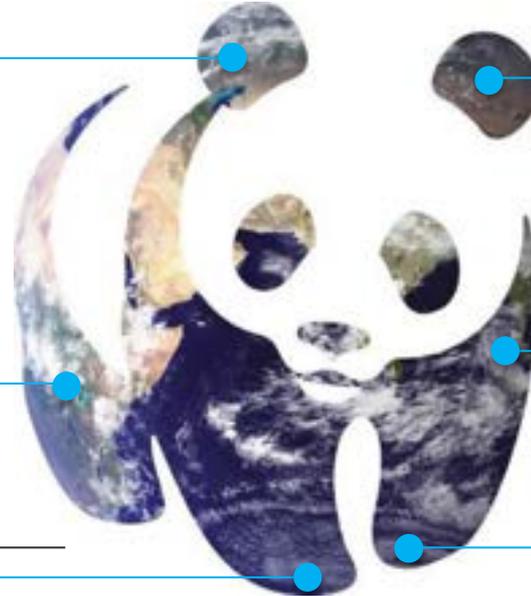
WWF International

+100

WWF is represented in more than **100 countries.**

707 Mio. €

Revenues via donations, licenses, external funds and testaments.



+6 Mio.

Supporters worldwide

6600

Employees worldwide

+25 Mio.

Follower on social media

Source: WWOV 2016 & Annual Review

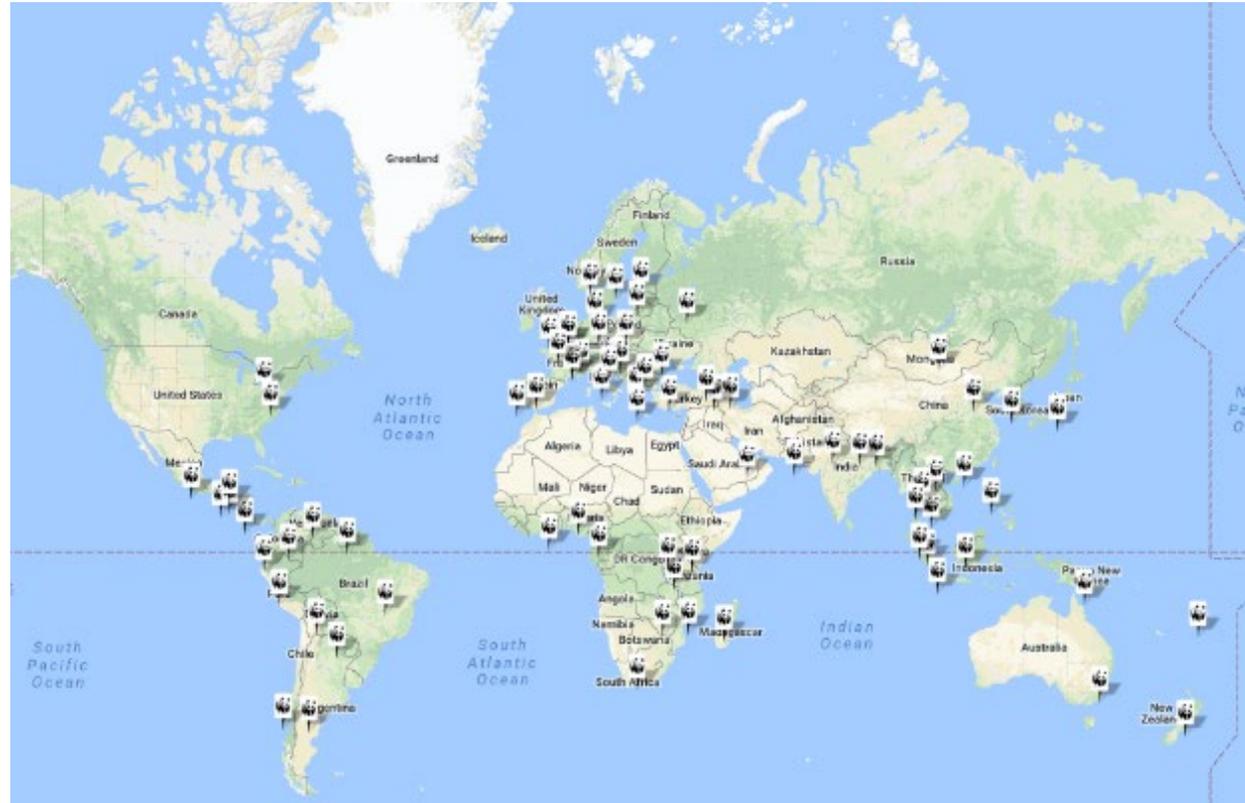


WWF on the Ground

In more than 100 countries:

33 financially independent organizations (NOs)

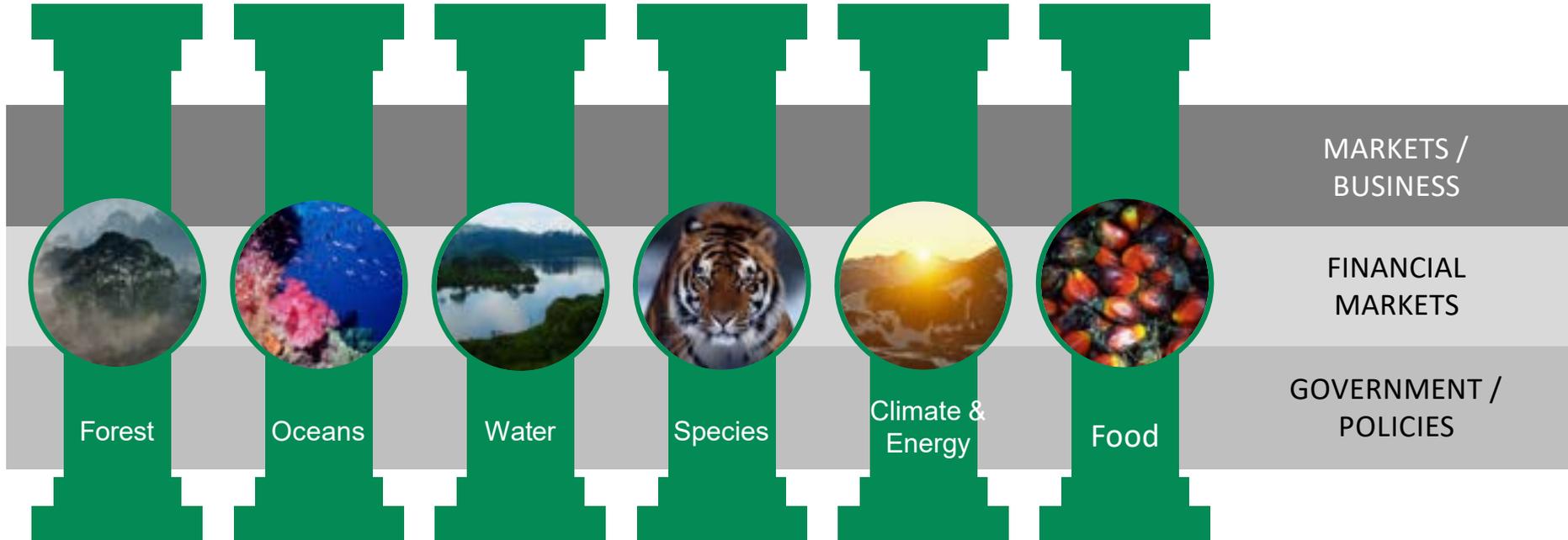
More than 70 offices reporting to WWF Intl.



... which is at the core of why and how WWF works with markets and businesses

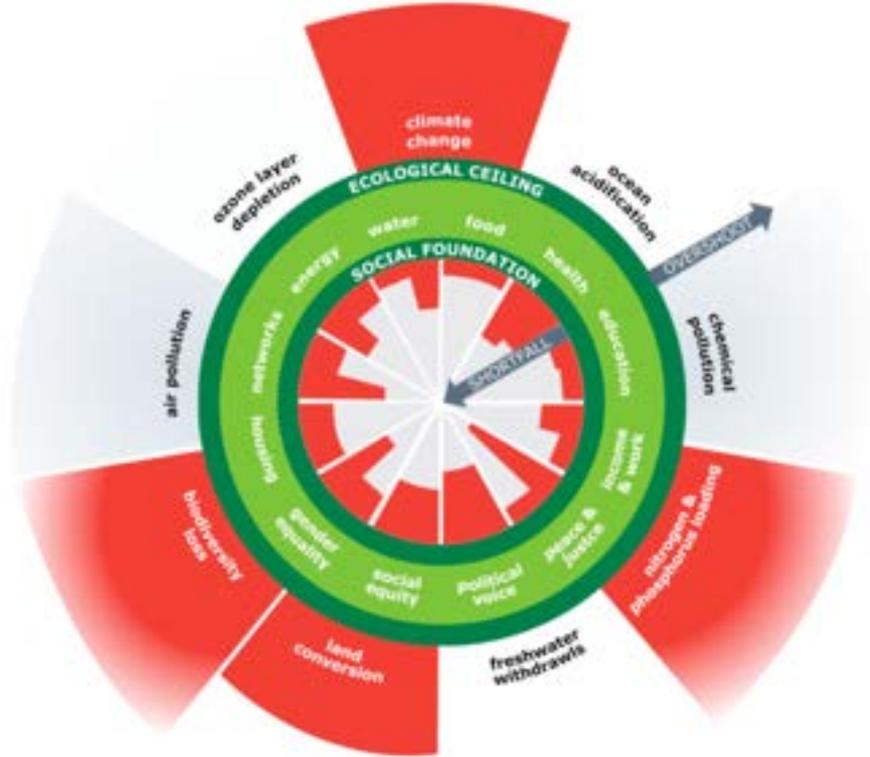


Corporate Engagement Strategy





Planetary Boundaries & Social Wellbeing





Sustainable Tourism & Conservation

Martina.vonMuenchhausen@wwf.de

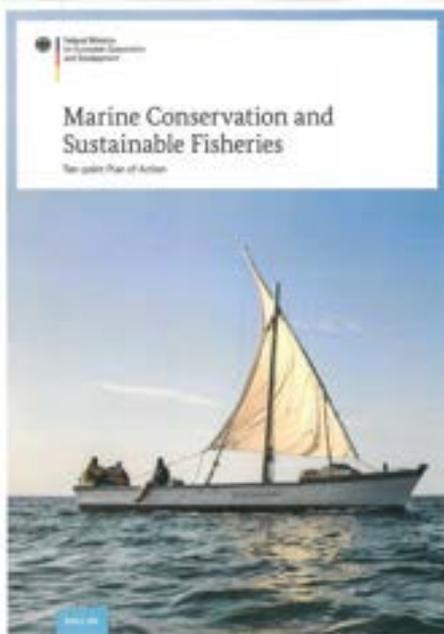
WWF's tourism work: Leveraging the Tourism Sector



- Develop community and nature-based solutions in WWF projects
- Transform industry and corporate operations through strategic partnerships and alliances
- Develop and assess certification and standards
- Support international Initiatives
- Engage business, travelers and consumers



Partnerships and Initiatives





WWF Area of Interest in the domain of Tourism and Conservation

1. Monitoring of Biodiversity and Impact

2. Monitoring of Tourism Traffic Volume



3. Climate Smart Mapping and Zoning

5. Identify Unsustainable Tourism Practices

4. Support Remote Areas and Rural Communities



1. Monitoring of Biodiversity and Impact

- Technical solutions to measure and monitor the impact of tourism activity and conservation progress: Involve and equip partners, guides, drivers and tourists to become conservationists
- Game counts from space: Need for high resolution satellite imagery used for game counts to measure and monitor wildlife and natural landscape recovery and conservation performance of a tourism product
- Monitor the loss or conversion of ecosystems and its associated wildlife population; e.g. mangrove's loss, conversion into cropland and settlement areas



2. Monitoring of Tourism Traffic Volume

- Monitoring tourism traffic volume creating conflicts with wildlife along roads, tracks, riverbeds and marine and coastal hotspots
- Monitoring overtourism in fragile natural sites and landscapes for better allocation of visitors and minimize impacts, accidents and collisions
- Examples:
 - Namibian Riverbeds with elephant herds and communities in conflict with self-drive tourists
 - Mexican Whalesharks and tourist boats
 - Manatees in the Caribbean



3. Climate Smart Mapping and Zoning

- Technical support in form of mapping and zoning to evaluate and regulate landuse and conversion (spatial planning tool)
- Applications:
 - For planning of tourism infrastructure such as hotels, marinas, airports to avoid destruction of ecosystems
 - Improvement of ship's routing (whale ship collision avoidance systems)
 - Land use zoning system to protect ecosystems which are nature based solutions for climate protection (mangroves and coral reefs)





4. Support Remote Areas and Rural Communities

- **Market Access is missing:** Connectivity between tour operator and nature based and community based tourism products is missing; Need for increased traveler's experiences in rural remote areas;
- Need for digital support to build an online platform or similar tools for products, activities, handcraft, accommodation and food offered by rural communities in remote areas where sustainable tourism development is needed in collaboration with WWF



5. Identify Unsustainable Tourism Practices

- Critical guidance for travelers and visitors is missing; There is no quality check for Online Travel Agencies (OTAs);
- Need for screening of tourism platforms: technical support to develop criteria and algorithms to identify negative practices and highlight sustainable business practices



WWF

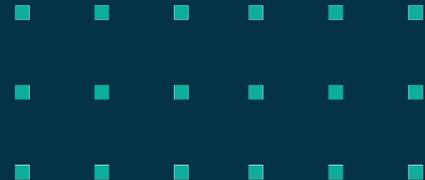
Guest speaker #4

Paras Loomba

Founder at Global Himalayan Expedition



GHE





**GLOBAL
HIMALAYAN
EXPEDITION**



800 million people – STILL in DARKNESS





Current Rural Tourism Problem



Lack of Basic Facilities



Lack of Education & Livelihood

Results in



**Limited New Rural Destinations
“Migration of Tribes
& Lost Culture”**



Global Himalayan Expedition

Empowering Remote Villages through Tourism



TOURISM & TECHNOLOGY AS FORCE FOR DEVELOPMENT

UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS 2030



167

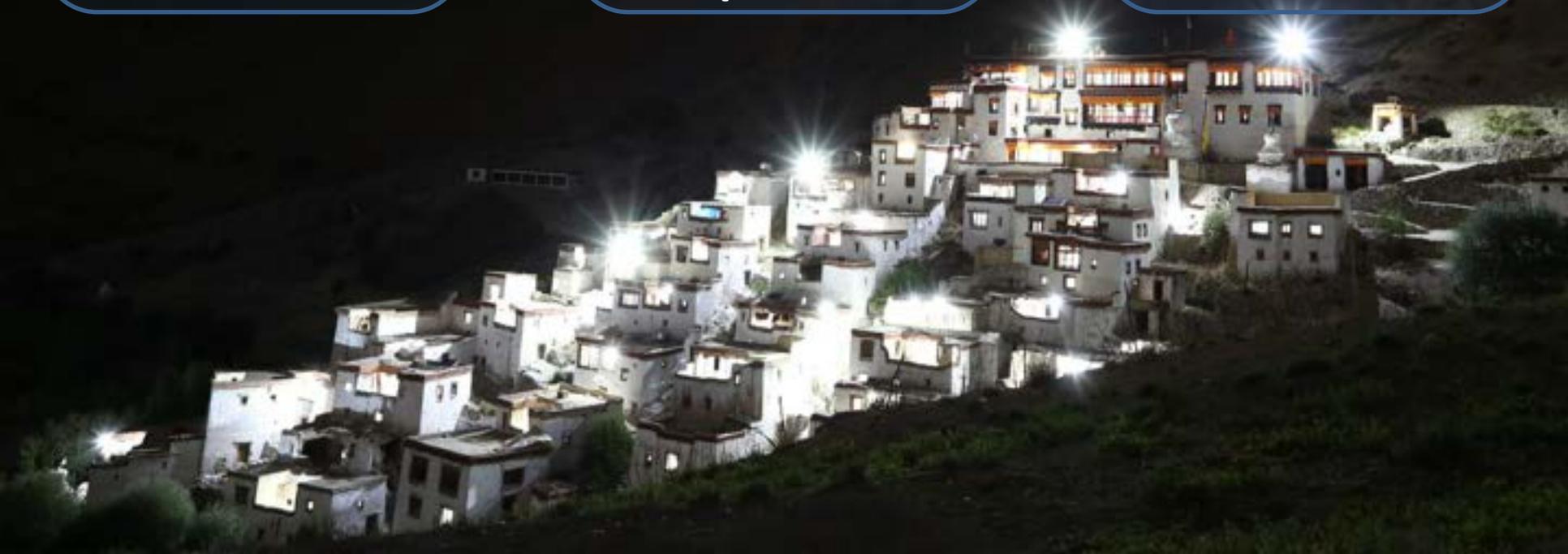
Villages
Electrified

100,000

Lives
Impacted

35700

Tons CO2
Offset



VISIBLE IMPACT



Harmful Kerosene Oil Lamp



Impact of a LED Light



SOLAR POWERED HEALTH CENTRES

- **Creating Solar Powered Health Centers with better medical equipments'**
- **Provide good quality Health Care to the Communities**
- **Training of the local medical staff on the installed appliances**
- **Developing a sustainability model for smooth operations of medical centres**





COMPONENTS OF A HEALTH CENTRE



Providing the Basic Health Care Infrastructure required at Health Care Centre

SOLAR POWERED HEALTH CENTRE IN LADAKH (CHANGTHANG)



ACCESS TO CLEAN COOKSTOVES

A woman with her hair in a bun, wearing a green shirt and a purple and pink striped sari, is sitting on the floor in a rustic kitchen. She is cooking over a traditional wood-burning stove. A fire is burning in the stove, and a large metal pot is placed over it, containing a yellow liquid. Various other kitchen items, including a metal pot, a wooden box, and some plastic containers, are scattered around the stove. The walls are made of mud or plaster, and there is a window in the background.

Providing a Transformative Solution for the Rural Communities



Use of Traditional Cookstoves on Firewood that Emit Toxic Fumes



PROPOSED SOLUTIONS: CLEAN COOKSTOVE



- **80% reduction in smoke & toxic emissions**
- **50% reduced cooking time**
- **60% reduced fuel requirement**
- **50% reduction in fuel costs**
- **40% improvement in cooking efficiency**

60% reduction in CO2 and 40% reduction of Black Carbon



Empowering communities

Mountain Homestays

An initiative by Global Himalayan Expedition



Solar Powered Homestays



Astrotourism in Himalayas

A night sky photograph of the Himalayas. Two white stupas with red and blue details are visible in the foreground, set against a backdrop of dark, rocky terrain. The sky is filled with stars, and the Milky Way galaxy is prominently displayed, arching across the upper portion of the frame. The overall scene is a stunning example of astrotourism in a high-altitude region.

Maan, Ladakh

ASTROSTAYS



Maan, Ladakh



WOMEN EMPOWERMENT

A woman with dark hair tied back, wearing a purple long-sleeved shirt, is focused on working with electrical wires. She is holding a green wire and a white cylindrical component. The background shows a rustic structure with wooden poles and a thatched roof.

Electrical training

A woman wearing a grey cardigan and a patterned headscarf is pouring tea from a large, colorful thermos into several white mugs on a table. In the background, other people are seated, and a poster is visible on the wall.

Homestays training



Life in Himalayas during Winters



Post COVID Challenges



Post COVID 19

“Sustainable Tourism will Increase”

- In a post COVID world, people will avoid long haul travel and **prefer to travel domestic**
- Additionally, there is a strong **inclination to visit offbeat destinations and stay in homestays**



Lack of Infrastructure

“No Basic Facilities”

- **The village homestays do not have access to basic health care and are most vulnerable**
- There are also no basic information and Monitoring facilities that are available at these remote locations

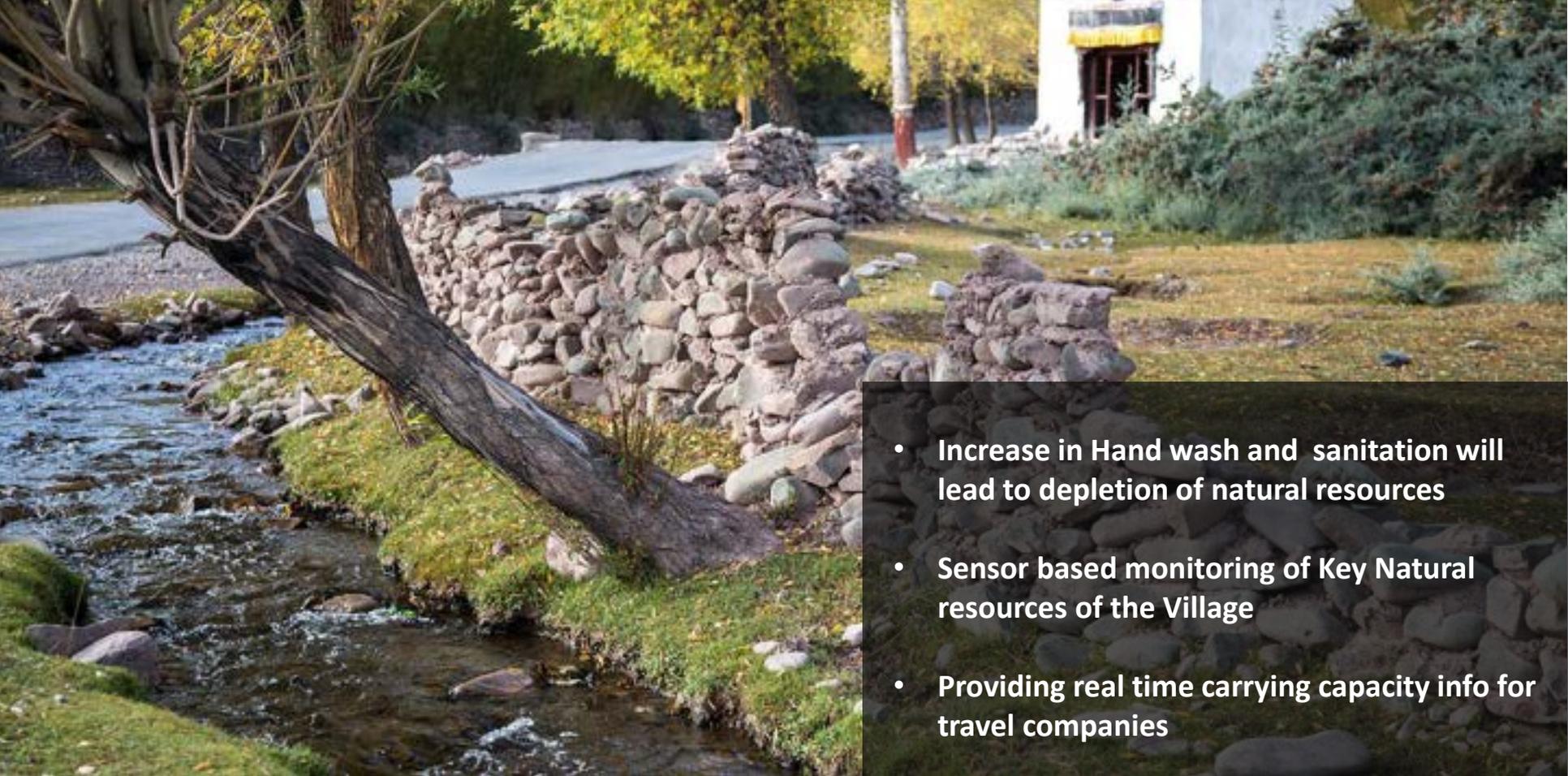


Lost Opportunity

“Zero income”

- Travelers will **demand basic facilities** at accommodations & safety net at these destinations
- A poor setup will lead to **low confidence translating into zero revenues** for these communities

Challenge 1 – Destination Natural Resource Monitoring



- Increase in Hand wash and sanitation will lead to depletion of natural resources
- Sensor based monitoring of Key Natural resources of the Village
- Providing real time carrying capacity info for travel companies

Challenge 2 – Traveler Accommodation & Safety Updates



- Availability of Safe Accommodation in remote areas will be essential post COVID
- Satellite based information on the availability of the accommodation will be crucial
- This will be like a booking engine with two way interaction between the host and traveler

Challenge 3 – Portable GPS based Health Monitoring



- Group trekking will require confidence among fellow travelers
- GPS system with integrated health monitoring system will be essential
- Will convey the vitals to the nearest hospital aiding swift rescue and action



Paras Loomba
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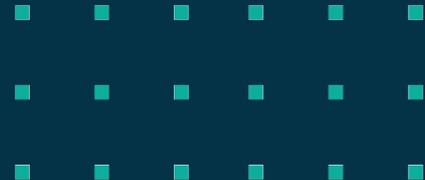
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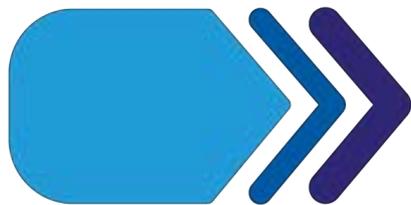
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Guest speaker #5

Katerina Saridaki

Director CapsuleT,
Hellenic Chamber of Hotels





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| TRAVEL & HOSPITALITY ACCELERATOR |



space solutions

Spase for Tourism webinar

ΜΙΑ ΠΡΟΤΟΒΟΥΜΙΑ ΤΟΥ
AN INITIATIVE BY THE



ΕΛΛΗΝΙΚΟ ΕΠΙΜΕΛΗΤΗΡΙΟ ΕΜΜΑΔΟΣ
HELLENIC CHAMBER OF HOTELS





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The Greek Startup Ecosystem

- ❑ An ecosystem developed in the last 12 years
- ❑ EquiFund = over 300 million euros government, EU and private capital funds
- ❑ 9 Greek funds are managing investments 2018-2022
- ❑ 8-10% of the Greek startups are focusing on tourism (5th place)



ΜΙΑ ΠΡΩΤΟΒΟΥΛΙΑ ΤΟΥ
AN INITIATIVE BY THE



HOTELS

ΕΛΛΗΝΙΚΟ ΕΠΙΜΕΛΗΤΗΡΙΟ ΕΛΛΑΔΟΣ
HELLENIC CHAMBER OF HOTELS



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The Greek Startup Ecosystem

- ❑ Many initiatives such as incubators, accelerators and competitions have been organized and funded by the private sector
- ❑ Very limited involvement / initiatives came from the public sector
- ❑ Non of the initiatives had focused on travel & hospitality
- ❑ More than 27% of the Greek GDP is coming from tourism*

*In 2019, contribution of travel and tourism to GDP (% of GDP) of Greece was estimated between 27.5 % to 33% (direct and indirect)

ΜΙΑ ΠΡΩΤΟΒΟΥΛΙΑ ΤΟΥ
AN INITIATIVE BY THE



ΕΛΛΗΝΙΚΟ ΕΠΙΜΕΛΗΤΗΡΙΟ ΕΝΔΟΧΕΙΡΑΚΩΝ
HELLENIC CHAMBER OF HOTELS



Who we are

The **Hellenic Chamber of Hotels** operates since 1935 as a Legal Entity of Public Law. It is the institutional consultant of the Government as far as tourism and hospitality issues are concerned. Its members are, by law, all the hotels and camping sites of the country.

Capsule^T is a non profit initiative powered by the HCH





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Our Vision

Capsule^T launched in April 2019 with the vision to build an innovative ecosystem in the tourism sector by offering opportunities to create and develop startups with a global perspective and impact.

By creating this infrastructure, the HCH also aims to enhance the technological evolution of its 10,000 hotel members and answer challenges they are facing.



ΜΙΑ ΠΡΩΤΟΒΟΥΛΙΑ ΤΟΥ
AN INITIATIVE BY THE



ΕΝΩΣΗ ΧΕΙΡΑΚΟ ΕΠΙΜΕΛΗΤΗΡΙΟ ΕΛΛΑΔΟΣ
HELLENIC CHAMBER OF HOTELS



Capsule^T where T stands for
Tourism, Technology and Travel!

- ✓ The first accelerator in Greece focusing on tourism
- ✓ 2 programs for local startups: Idea Platform and Acceleration
- ✓ 2 new programs focusing on activities and opportunities abroad
- ✓ Builds synergies and other initiatives to help startups and the tourism industry innovate and evolve!

Activities and Programs

A. Local Programs

Idea
Platform

Creating a pipeline for new
ventures

Acceleration
Program

Accelerate startups to scale up in
the local market

B. International Programs *(new)*

Exchange Visits &
Delegations

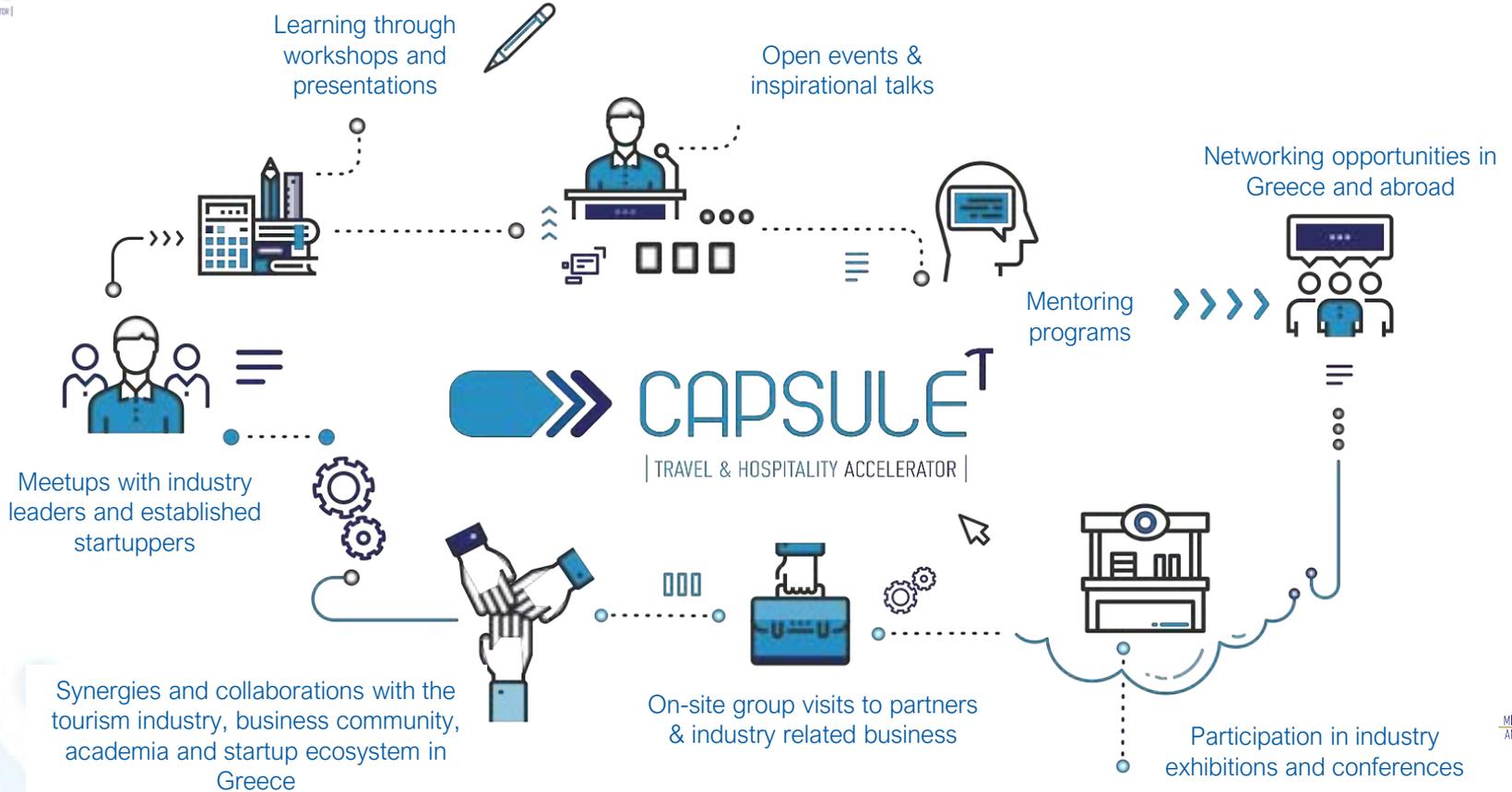
Market expansion, research
and networking

International
Bootcamp

Market expansion, exposure and
collaborations



Our program mix





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What have we accomplished?



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AN INITIATIVE BY THE



ΕΛΛΗΝΙΚΟ ΣΥΝΔΕΣΜΟΣ ΞΕΝΟΔΟΧΕΙΩΝ
HELLENIC CHAMBER OF HOTELS



Sponsor

Grow with Google

With the support of



USA-GREECE
CELEBRATING 100 YEARS OF
FRIENDSHIP
U.S. EMBASSY ATHENS

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Grant Thornton



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AN INITIATIVE BY THE



ΕΠΙΧΕΙΡΗΣΙΑΚΟ ΠΡΟΓΡΑΜΜΑ
WELCOME CHANGE OF HOTELS

Our impact at a glance....



*The numbers presented are the overall review from September 2019 to November 2021.

Our impact at a glance....



*The numbers presented are the overall review from September 2019 to December 2020.



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| TRAVEL & HOSPITALITY ACCELERATOR |



Tourism and the Covid-19 era: Opportunities and challenges through innovation and tech development



ΜΙΑ ΠΡΟΤΟΒΟΥΛΙΑ ΤΟΥ
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ΕΛΛΗΝΙΚΟ ΣΥΝΔΕΣΜΟΣ ΞΕΝΟΔΟΧΕΙΩΝ
HELLENIC CHAMBER OF HOTELS



Covid challenges for the tourism industry (top priorities during pandemic)

- ✓ Health & Safety
- ✓ Touchless contact
- ✓ From mass to personalized experiences
 - ✓ Operational adjustments
 - ✓ Upgraded digital literacy for all
- ✓ Virtual "travel dreaming" from home





Which are the actual needs of Greek hotels regarding technology?



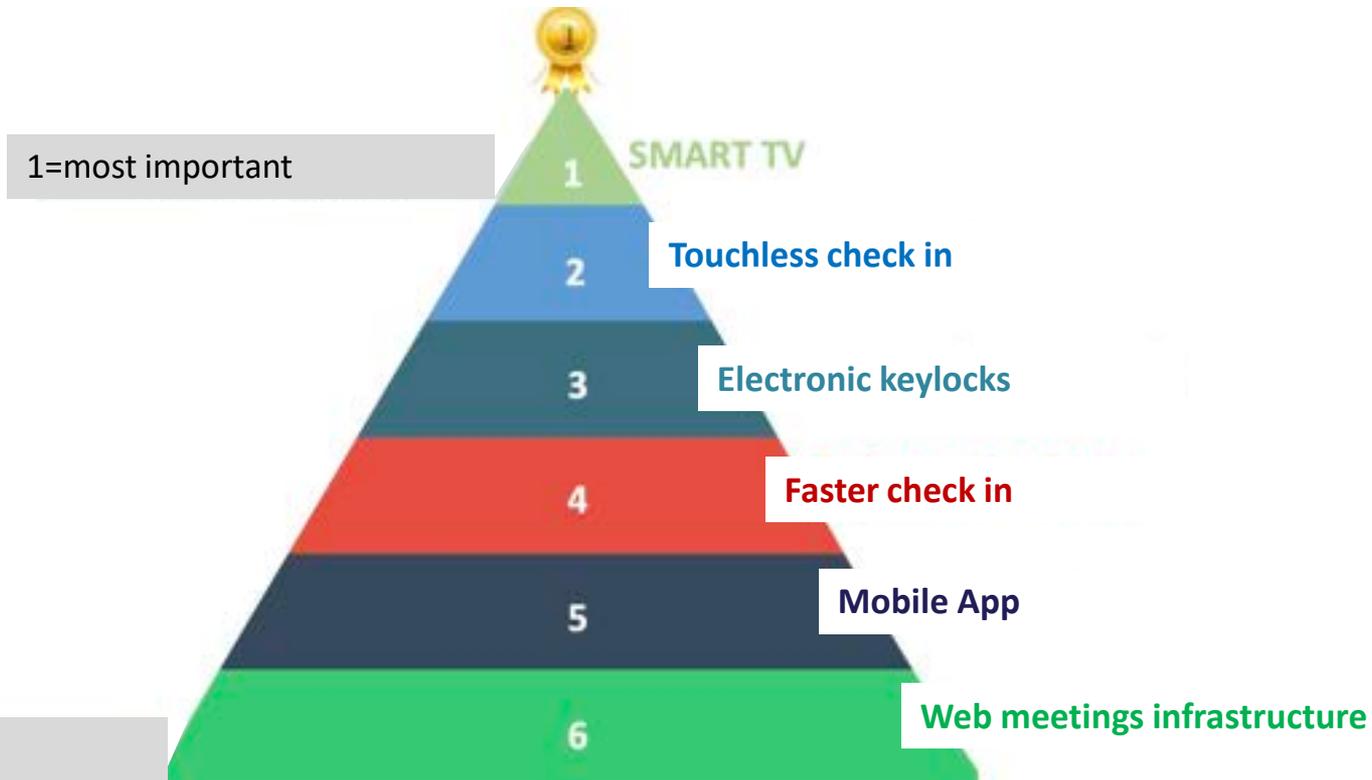
Key Findings from the resent research “Penetration and Usage of New Technologies for Greek Hotels operations”, Research Institute for Tourism, July 2021

Hoteliers' priorities of new or upgraded tech solutions and tools



Source: Research Institute for Tourism, July 2021

Hoteliers' priorities of new or upgraded tech solutions and tools



Source: Research Institute for Tourism, July 2021

Other key areas of interest in the tourism sector

- ✓ Sustainability solutions and management
 - ✓ Renewable energy / Energy conservation solutions
 - ✓ Accessibility – solutions for people with special needs
 - ✓ Accessibility-transport in rural communities
- ✓ Quality measurements & control (beach/sea/atmosphere)
- ✓ Extreme weather conditions – emergencies (fires, floods)
- ✓ Connectivity solutions in rural areas / islands (internet, locals)
 - ✓ Outdoor/"nature" trends – activities, glamping, RVs

How Capsule^T can help in Greece...

- ✓ Inform / educate young entrepreneurs / hoteliers / tourism ecosystem
- ✓ Support startups to develop solutions and new business ventures
- ✓ Connect stakeholders both locally and globally
- ✓ Guide travel/hospitality startups to enter ESA for tourism



Support spreading new ideas, sources of funding and opportunities to create advanced tech solutions!

Welcome On board!



Katerina Saridaki, Director
[linkedin.com/in/katerina-saridaki-athens](https://www.linkedin.com/in/katerina-saridaki-athens)

Visit our Website:
<https://www.capsuletaccelerator.gr/>

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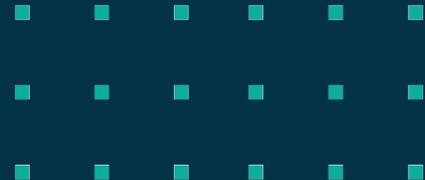


Guest speaker #6



Steven Valcke

Research & Policy,
Toerisme Vlaanderen – VISIT FLANDERS





**Visit Flanders'
challenges for
space**

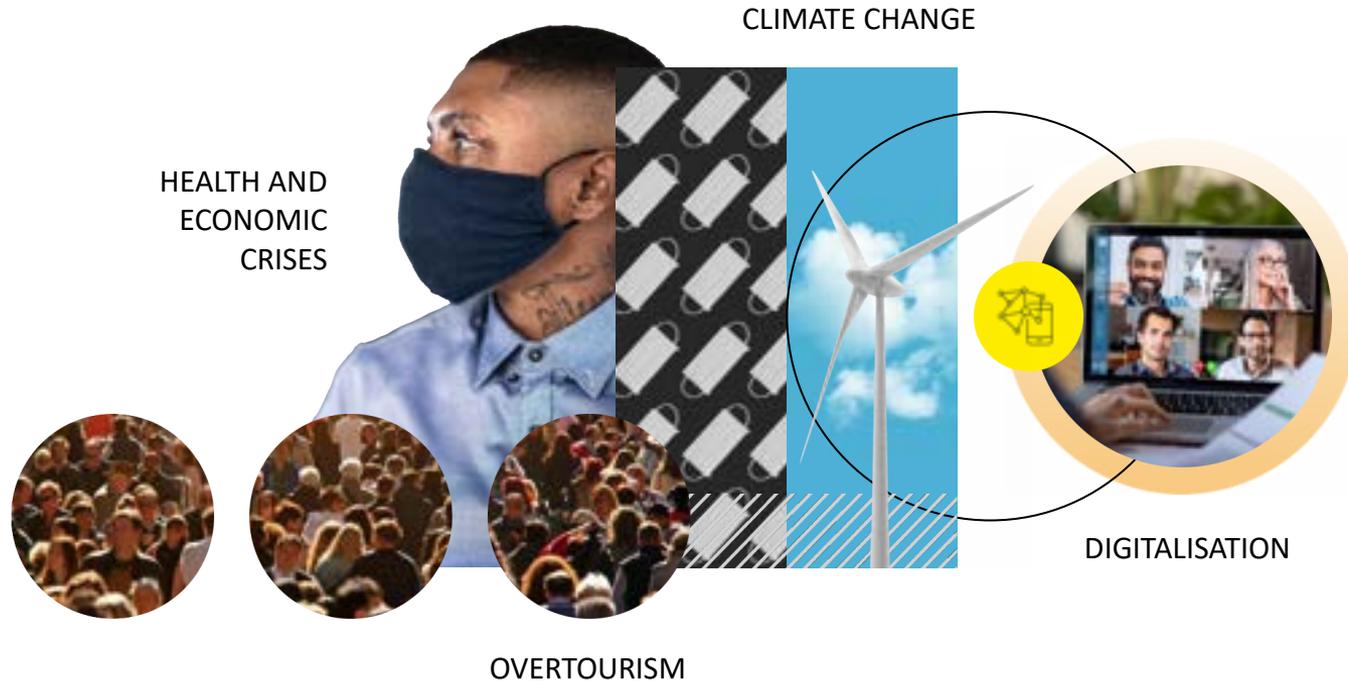


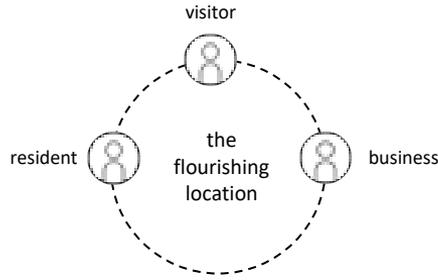
VISIT FLANDERS?

internal independent
agency of the Flemish Government,
responsible for tourism development and
promotion

(there is no national tourism organisation in Belgium)

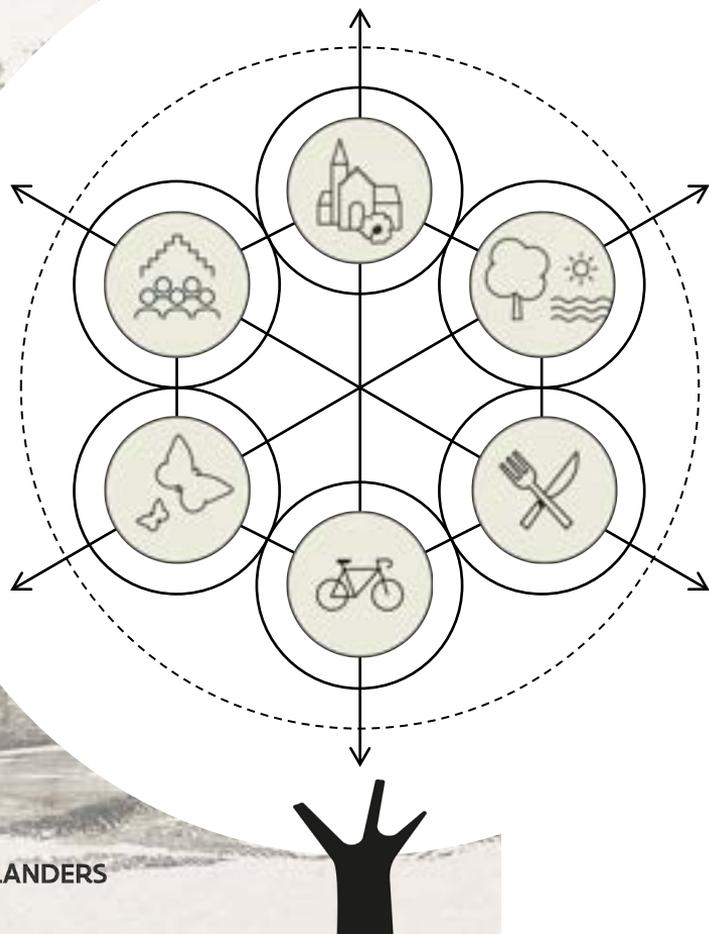
CURRENT TOURISM MODEL IS UNDER PRESSURE





OUR VISION

We want to strengthen the role of tourism as a positive force, ensuring Flanders can thrive as an innovative, inspiring and qualitative travel destination, for the benefit of its inhabitants, entrepreneurs and visitors.



Six themes which connect into the DNA of Flanders

- Heritage experience
- Flanders Naturally!
- Culinary Flanders
- Flanders as a cycling country
- Why Holidays Matter (Iedereen Verdient Vakantie)
- Conferences and events



3 CHALLENGES

1. COUNTING NUMBER (PROFILE) OF CYCLISTS

- Recent development of several long distance cycling routes:
 - Made for trips taking more than one day
 - Available in GIS format
- Issues:
 - These routes are using roads used by many other users
 - The target group will probably only be a small part of the users of those roads.
 - Important to measure the success
- Measuring at this moment:
 - Manual counting by volunteers (surveying cyclists on specific points)
 - Not very efficient

2. COUNTING THE NUMBER OF TOURISTS IN THE DESTINATION

- Arrivals and overnights in officially recognised commercial accommodations are counted since 1930's.
 - Showing economic value
- Issues:
 - Airbnb stimulated strongly unofficial accommodations.
 - Cruise passengers are not included
 - Day tourism is not included
- Attempts in the past:
 - Use of telco data (single source) for events or on city level
 - Not very satisfying

} Incomplete
overnights
statistics }

Important for
estimating
overcrowding

3. LINKING EMISSIONS TO TOURISM

- Measuring framework for tourism available
 - Measuring impact of tourism on many aspects
- Issues:
 - Framework  all data are available
 - Emissions linked to tourism in particular
- Actual situation:
 - CO2 emissions calculated for air transport based on distance and averages
 - Attempts together with European Travel Commission to use satellite data
 - Linking to tourism is difficult
 - Correlation vs causality

THANK YOU

STEVEN VALCKE
VISIT FLANDERS

STEVEN.VALCKE@TOERISMEVLAANDEREN.BE

VISITFLANDERS

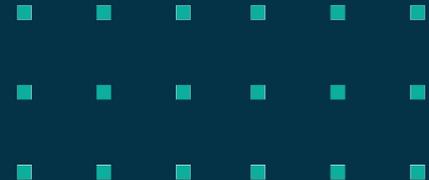


Guest speaker #7



Thomas Landis

Head of Corporate Development, IT & Innovation
Andermatt Swiss Alps AG





Future of Andermatt

Thomas Landis



Development of Andermatt as a destination



We build nice Real Estates









We build & operate Hotels





We operate the SkiArena



We operate the Golfcourt



and Restaurants



We are a part of Orascom Development

8 Countries 14
Destinations
33 Hotels 7'205 Rooms
101 Mio. m2 Land
around 9'000 Employees

ORASC  M
DEVELOPMENT





Starting from ...





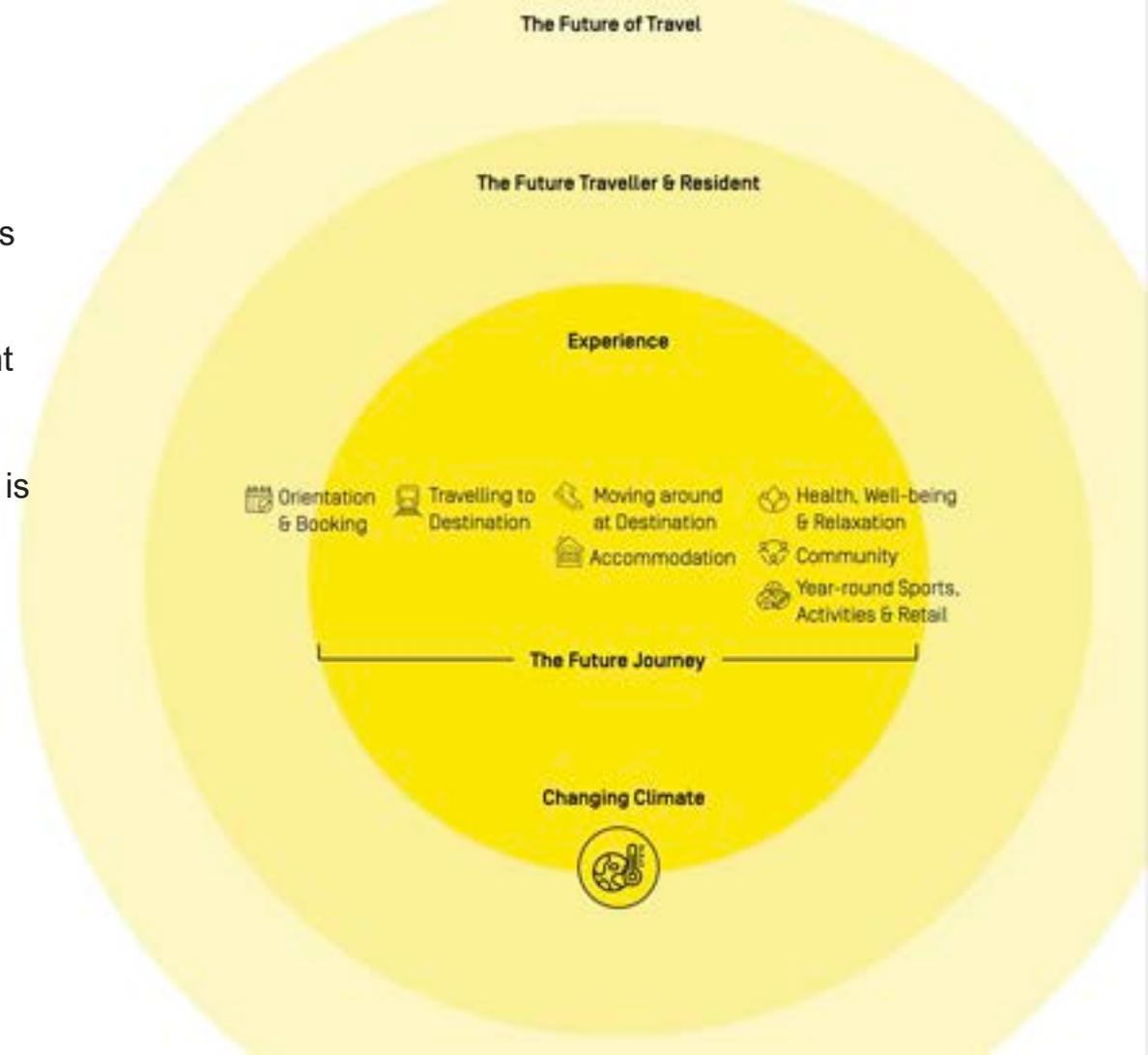
What will be the Future of Travel & Swiss Mountain Resorts?



There is no question that the COVID-19 pandemic has dramatically changed our daily lives, travel behaviour, preferences and needs. To grasp these new challenges and meet our responsibilities beyond the current global crisis, we asked the Spark Works team to help us better understand the future. Their work is now our guide and map to proactively shape the future.

4 Key Topics we looked at:

- Climate Change
- Digitalisation
- Globalisation
- Sustainability



-61% is the expected surface loss of Andermatt glacier by 2030 compared to 2010. 2.4°C the temperature increase in December

Expected rise of temperatures per month in 2030

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Increase in °C in 2030	0.3	1.6	1.2	0.3	-0.2	1	0.6	0.8	1.7	1.5	2.3	2.4



Melting glaciers



-61%

is the expected surface loss of the **Andermatt** glacier in 2030 compared to 2010.

-41%

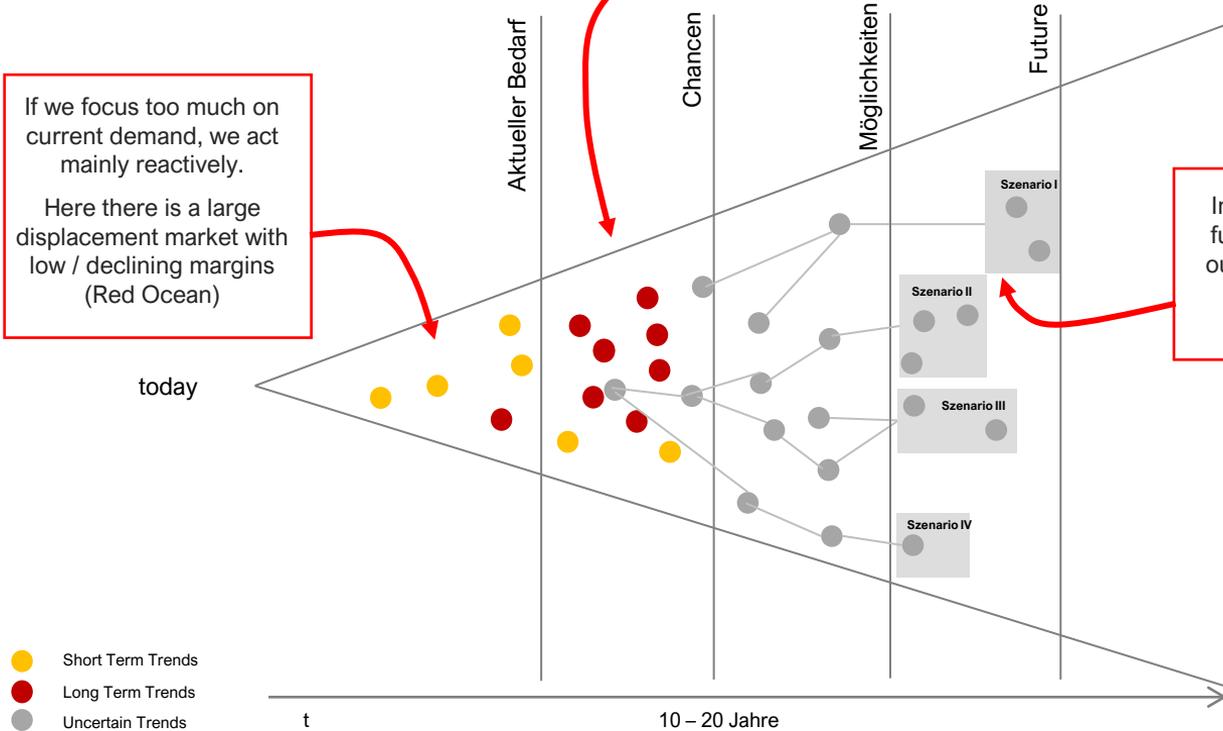
is the expected surface loss of the **Goeschenen** glacier in 2030 compared to 2010.

Vision Cone (illustrative)

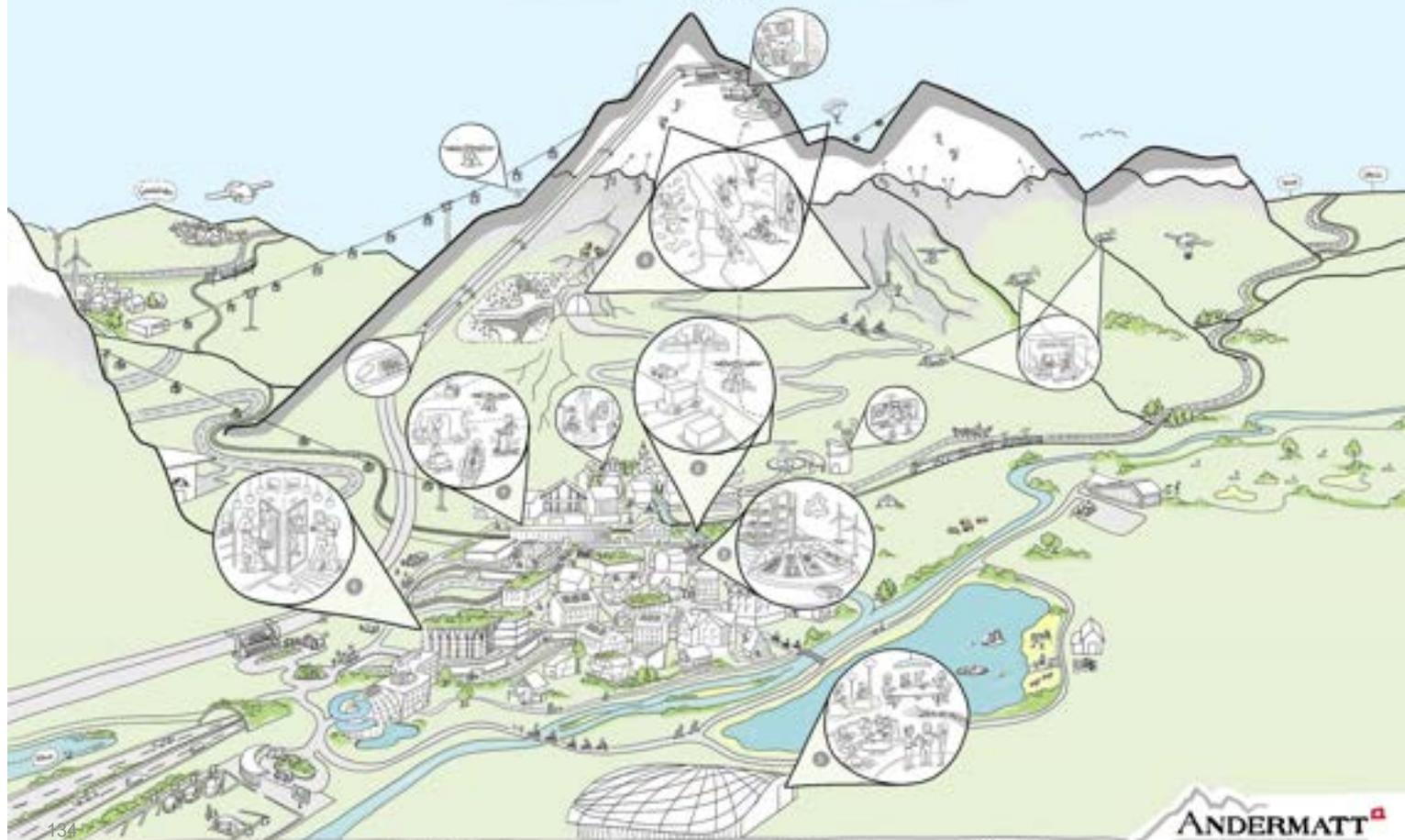
To find new, lucrative revenue streams, we need to look for future opportunities.
There is no price war (yet) and no margin shrinkage (Blue Ocean)

If we focus too much on current demand, we act mainly reactively.
Here there is a large displacement market with low / declining margins (Red Ocean)

In order not to miss the future, we have to work out future scenarios and thus identify opportunities



PRIME ALPINE DESTINATION 2040



- 1. **Enhance connectivity to the destination**
- 2. **Build smart urban**
- 3. **Improve mobility**
- 4. **Revitalize housing & recreation with the village**
- 5. **Go up, & out, & sideways**
- 6. **City center to attract**

ANDERMATT
SWISS ALPS



We believe in 2040, residents will find an authentic holistic experience and are inspired to actively participate in expanding Andermatt's ecosystem!

Thesis we believe Andermatt has great potential in:



Multimodal travel for first & last mile

In 2040, Andermatt offers a multi modal mobility infrastructure/service (which makes privately owned cars unnecessary) that entails a connection to other cities, mountain-valley-logistics and smart-last-mile solutions, which effectively ensures optimal traffic management.



Community creation

In 2040, tourists/visitors in Andermatt feel like residents. Smooth digital offerings and events support this integration into a multi-national diverse community.



Flexible smart logistics

In 2040, Andermatt will have a holistic, universal and flexible logistics system. Artificial intelligence and multiple usage concepts enable the region and all companies to distribute goods and people in a highly efficient and sustainable manner.



Flexible housing & ownership, work-life-integration

In 2040 in Andermatt, habitants and tourists will equally have the option to use flexible housing & leisure services to ensure convenient short-term visits as well as the possibility to work from Andermatt by offering the right infrastructure.



eco-city & sustainability

By 2040, we will have reached a high sustainability level by investing in green energy solutions (water, wind, solar, energy harvesting technologies) and investing in more sustainable food production (such as vertical farming).



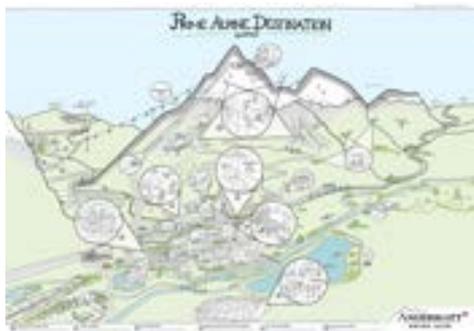
easy access to activities

In 2040, our customers will not have to chose between leisure activities and have instant access to the desired activity, not depending on weather, season, etc.

In order to strategically align ASA Group's innovation efforts, initiatives are bundled into innovation fields to realize the vision of

Picture of the future, innovation fields & initiatives

Picture of the future



Andermatt 2040

The future picture serves as the organization's compass for the future, based on scenarios that could define the future of tourism.

Innovation fields



Future of mobility



Future of hospitality



Future of leisure experience



Future of real estate



Data & IT enablers

Innovation initiatives

- 2021 Parkplatz, My Buxi
- 202x: Drone Testflights
- 202x: Hitch2Hike
- 202x: Drone Taxi

- 2020: Chatbot "Uela", online reservations
- 2021: SBB Packagetravel
- 2021: Digital Restaurant Solution (Mountain)
- 202x: Digital Hotel Solution

- 2021: Pilot Uela.fm
- 2021: Bundle Strategy
- 2022: Sommer aktivitäten

- 2021: Data Driven Marketing
- 202x: Virtual Reality, Augmented Reality, 3D Printing, ...

- 2021/22: Data Strategy
- 2021: Sandbox
- 2021/22: Digital Signaletik
- 2022: Marktplatz 2.0
- 202x: OneDestination

Prime
workplace



Be the most
customer-
centric prime
destination



Thank you for your attention

Thomas Landis

Head Corporate Development, IT & Innovation

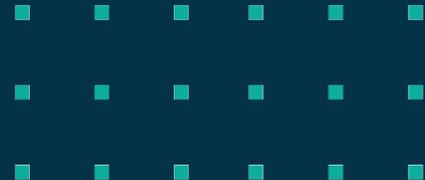
t.landis@andermatt-swissalps.ch

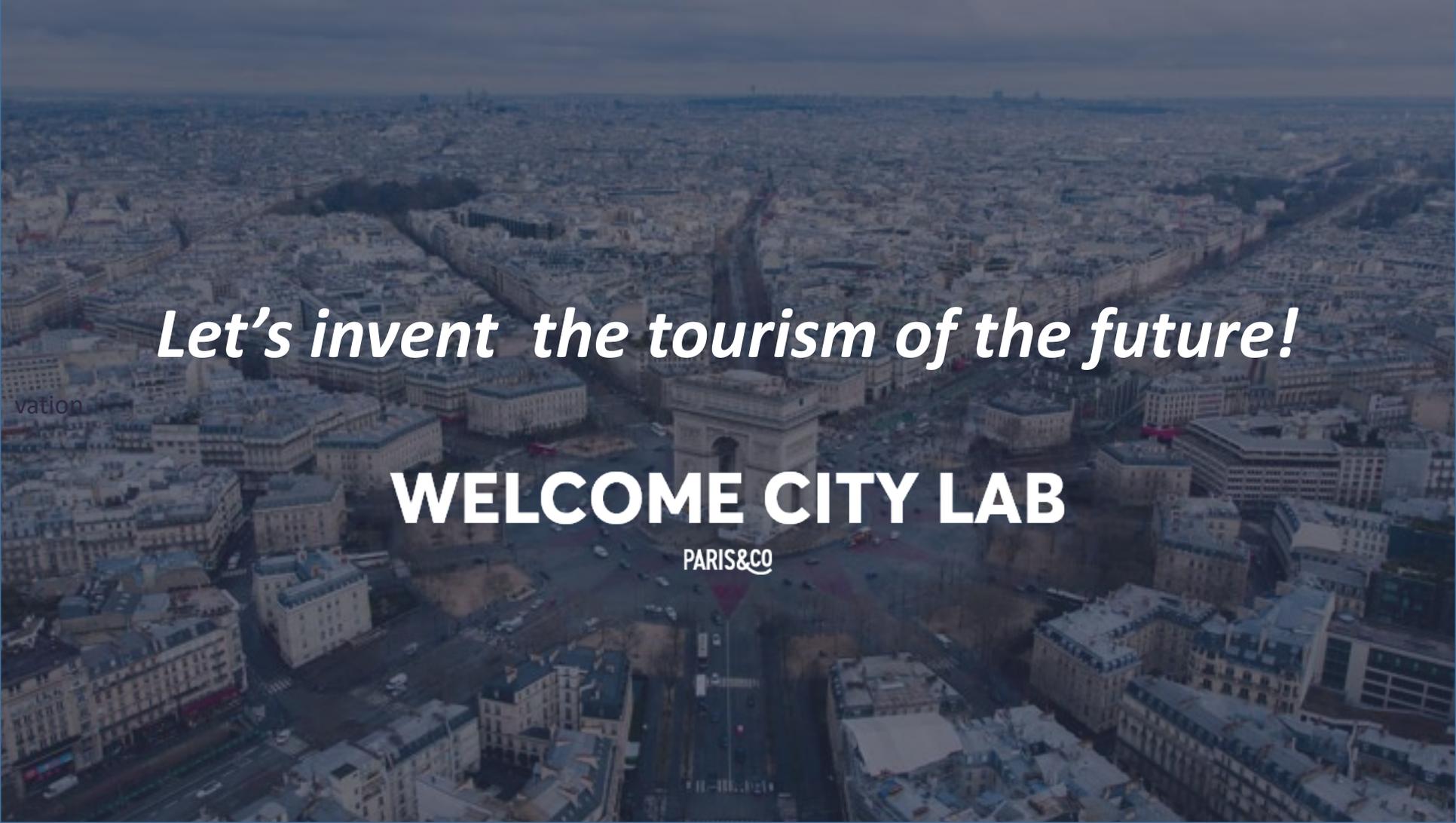


Guest speaker #8

Laurent Queige

Director of the Entertainment Cluster &
Welcome City Lab - Paris&Co



An aerial photograph of Paris, France, showing a dense urban landscape with many buildings and streets. The Arc de Triomphe is prominently featured in the center of the image. The sky is overcast and grey.

Let's invent the tourism of the future!

WELCOME CITY LAB

PARIS&CO

**Paris&Co is the innovation and economic
development agency of Paris**

NON-PROFIT
ORGANIZATION

METROPOLITAN AREA

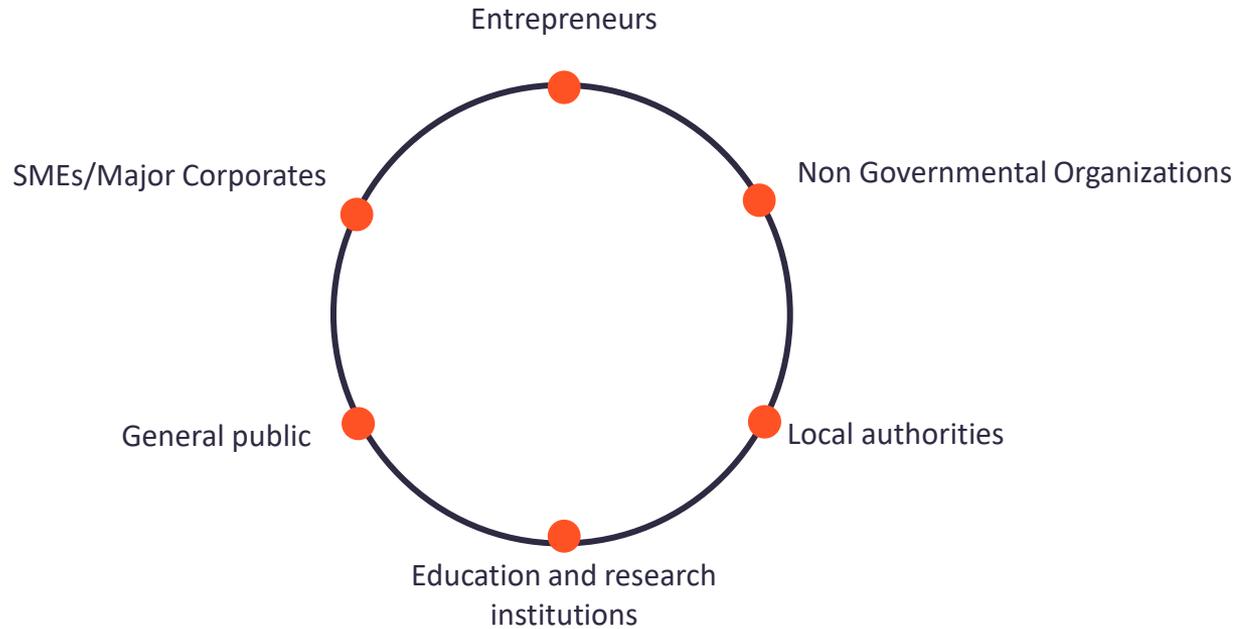
MIXED FUNDING

OUR OBJECTIVES

- > **Contribute to job creation through innovation**
- > **Generate tomorrow's champions**
- > **Stimulate and spread innovation**

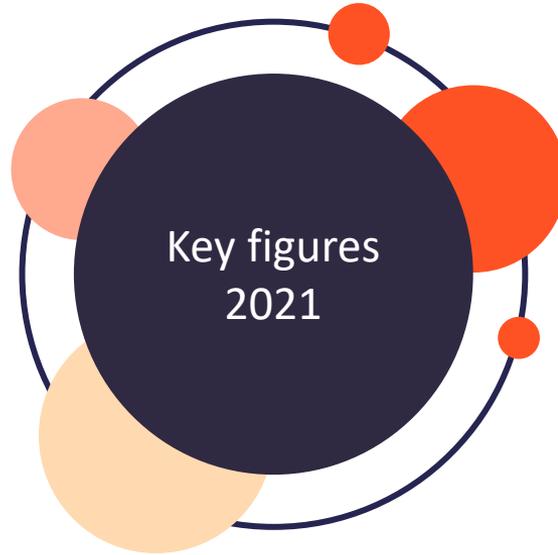


Our stakeholders



+100

Corporate and
institutional partners



486

Startups incubated

136

Projets supported

(acceleration, experimentation, territorial
development, foreign projects)

4 clusters



Sports
LE TREMPLIN



Health & Well-being
TECH CARE PARIS



Disability
HUA !

SPORT HEALTH DISABILITIES



Tourism
WELCOME CITY LAB



Event
FRENCH EVENT
BOOSTER



Esport
LEVEL 256



Creatives Industries
LINCC



Publishing
LABO DE
L'ÉDITION

ENTERTAINMENT

CORPORATE SOLUTIONS



Fintech
LE SWAVE



**New working trends and
HR transformation**
RHIZOME

SUSTAINABLE CITY



Incubation & Experimentation
URBAN LAB



Sociale Innovation
ARC DE L'INNOVATION

OUR OBJECTIVES

- > **Generate the champions of tomorrow's tourism**
- > **Create a culture of innovation in the travel industry**
- > **Foster synergies between traditional players and startups**



Thank you to our partners



Our 4 missions

INCUBATION / ACCELERATION

- > 1 to 3 year coaching
- > Coaches and mentors

ECOSYSTEM

- > Meeting sessions
- > Reverse-pitches
- > International

OPEN INNOVATION

- > Demo-days
- > Challenges
- > Experimentation

OVERVIEW

- > Tourism Startup Database
- > Trend-Book

Key figures since 2014

+150
Collaborations between
our partners & startups

+1,500
jobs created since the
launch of the platform



220 M€
Of private funds raised

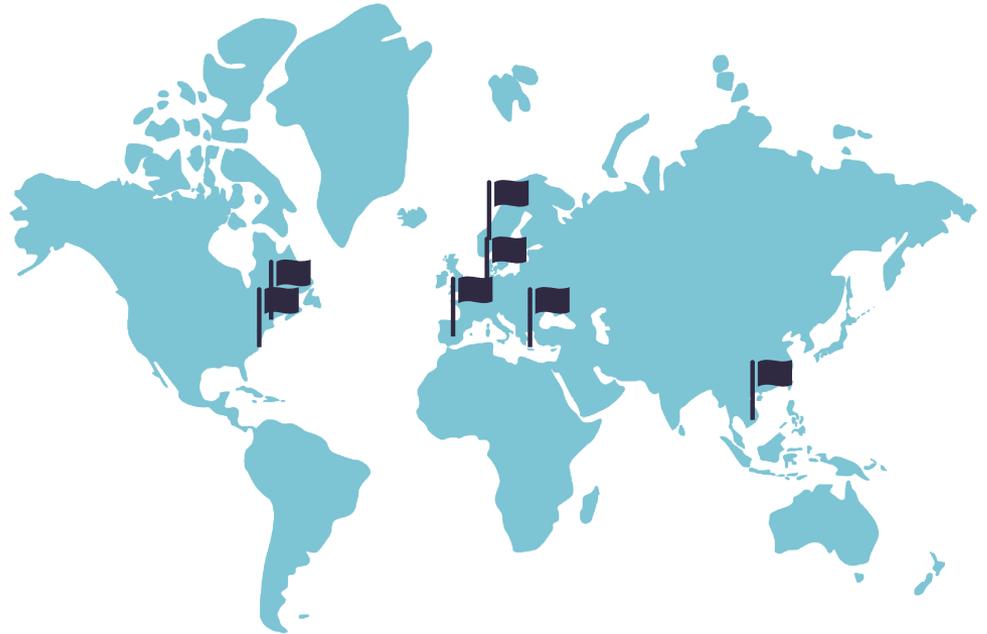
85%
sustainable rate

An international dimension

< Partnerships with other incubators or accelerators in the world
(Montreal MT Lab, Singapore Tourism Accelerator, Nordic Traveltech Lab, etc)

< **Member of the World Traveltech Forum**

< Speaker in major international conferences dedicated to tourism innovation
(ITB Berlin, PhocusWright, UzaKrota)



The traveltech innovation

Trend Book

- < Identifying the major innovative trends that will shape tomorrow's tourism sector
- < The creation of startup as a spectrum of analysis
- < The Trend Book has become a national and international reference

CAHIER-TENDANCES #6



Monitoring the trends in tourism

& travel innovation

- < 6 trend-books published
- < 35,000 readers (print/digital)
- < Many international contributors



TREND 1

Local and responsible tourism: from intention to action!

P.16/17 - EXPERT ARTICLE

Sustainable tourism and a health crisis: a historic conjunction?

Thomas Deshayes, Director of the Observatory for sustainable and accessible tourism at the Paris Convention and Visitors Bureau

P.18/28 - START-UP ARTICLE 1

Preserving your pleasures whilst preserving the planet thanks to high quality vacations

Nicolas Sterns Vincent, co-founder of 86 Co-Grand

Sustainable tourism: how to select and certify your accommodation offering

Florent Privatidis, Head of communication on sustainable development - Hovest

P.21 - INFOGRAPHIC

Local and responsible Tourism: What do the French think?

by Interface Tourism Insights

P.22/25 - START-UP ARTICLE 2

Ecology: the 3rd dimension of business travel

Isabelle Le Roux, co-founder CEO, The Sleep Mobile Bus, Head of M&I, The Sleep

P.24/25 - COUNTERTREND ARTICLE

Reverse Travel

Sébastien Wiest, Director of the Paris Office - Travel, Tourism and Culture Specialist - Slony Kasher & Partners

P.26/27 - INTERNATIONAL ARTICLE

Celebrating travelling... in a responsible way

Christine Barry, Demand Chair in tourism at ESC EQM - Analyst in strategic marketing

TREND 2

Contact-free technology, a trend that perfectly matches the latest aspirations

P.30/31 - EXPERT ARTICLE

One plus one equals three!

Almy Dreyfus, Director of customer experience at Fathosage

P.32/33 - START-UP ARTICLE 1

Perfecting hospitality thanks to digitization

Fabrice Cassin, founder and CEO of Ushahid

P.34/35 - START-UP ARTICLE 2

Catering: using digitization to get closer to customers

Gauthier Miravalles, CEO of Edgor

P.36/37 - COUNTERTREND ARTICLE

Digital technology working for the future of hospitality

Nagwan van Hoozemant, CEO and co-founder of Cagella

P.38/39 - INTERNATIONAL ARTICLE

Contactless Tourism: Rebuilding the Future of Travel & Tourism Industry

Sandya Nigam, Innovation Analyst

P.41 - INFOGRAPHIC

Example of a contact-free pathway

TREND 3

Teleworking, a new opportunity for the tourist industry?

P.44/45 - EXPERT ARTICLE

Teleworking, an opportunity to develop regional tourism, synergies between a "staycation" and local tourism

Sophie Casson, CEO Advanced Tourism

P.46/47 - FIELD ARTICLE

Teleworking, a growth driver for Best Western® Hotels & Resorts with the launch of its coworking brand enWO, assisted by the start-up Dodo-up

Olivier Cohen, CEO Best Western® Hotels & Resorts France/Western Europe, co-founder of Dodo up

P.48/49 - START-UP ARTICLE 1

P.50/51 - START-UP ARTICLE 2

The era of road warriors is over, make way for work/life balance!

Regisaths Barraud, founder of Barpaat

P.52/53 - COUNTERTREND ARTICLE

Teleworking: reconsidering how we live?

Philippe Dubouché, lecturer in Geography at the University of Angers and Director of the GSI French Tourismism

P.54/56 - INTERNATIONAL ARTICLE

"Workation": the new frontier for tourism in Italy

Fabiana Saraceni, Manager Digital Innovation and Marketing - About France in Italy

P.57 - INFOGRAPHIC

French people's holidays in 2021

The impact of the health crisis on how the French behave

Equipe - ESCPES / ALLIANCE/FRANCE TOURISME

TREND 4

New business models for cultural events?

P.60/61 - EXPERT ARTICLE

Cultivating Culture as a Business

André Anet, CEO - Grand Palais Avenue of

P.62/63 - START-UP ARTICLE 1

Immersion as a new model for experience

Mathias Desplachis, CEO and co-founder of Dream Factory

P.64/65 - FIELD ARTICLE

Festivals making requirements and the spectacular work together

Aurélien Dubois, Chairman B&B & Consultation - Chairman of the Chamber syndicale des fêtes musicales (festival of musicians)

P.66/67 - COUNTERTREND ARTICLE

Chartres in Lights, a free of charge model for tourist growth

Philippe Bessat, CEO of C'Chartres - Tourism - IRI

P.68/69 - INTERNATIONAL ARTICLE

Establishing new innovative business models for cultural experiences: best practices from Quebec

Laura Desautels, Analyst at the Advisory Network of the Tourism Chair in tourism at ESC EQM / Marie-Laurence, CEO, M7 Lab

P.70/71 - INFOGRAPHIC

Festivals and the COVID crisis, cultural diversity at the heart of the regions and dynamics for development

Yveline Pélissier-Dubé, Lecturer - University of Angers

Museums, exhibitions and the COVID crisis: weakening, permanence and renewal

P.72/73 - BONUS ARTICLE

Looking for new business models

TREND 5

Offering visitors permanent access to information: a major issue for specific and suitable offerings

P.76/77 - EXPERT ARTICLE

Offering visitors permanent access to tourist information: how can you make information accessible 24/7 in rural areas?

Stéphane Rivault, Director of the Agency of Information de la Région Bretagne, Director of the Agency of Information de la Région Bretagne, Director of the Agency of Information de la Région Bretagne

P.78/79 - START-UP ARTICLE 1

Access to information, a digital and mapping challenge

Stéphane Rivault, co-founder of MyCity

P.81 - INFOGRAPHIC

Travelers are constantly seeking tourist information, before, during and after their trip

Sylvain Deschamps, co-CEO & partner of Inet

P.82/83 - START-UP ARTICLE 2

Information at the right distance, without losing touch!

Yveline Pélissier-Dubé, CEO of TravelHub in

P.84/85 - COUNTERTREND ARTICLE

Big Mother is concealing you

Dominique Maréchal, Expert in Tourism

P.86/87 - INTERNATIONAL ARTICLE

Firing on all cylinders: How Singapore is reimagining tourism through tech

Wong Ming Pin, Chief Technology Officer, Technology Transformation Group - Singapore Tourism Board

P.88/89 - FIELD ARTICLE

Attendance: high potential "tourism data"

Paul Bessat, CEO of Agence

CONTACT



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Thank you!



How to apply



→ 'Space for tourism' call opens in March 2022 until 31 March 2023 for pitch submission

Q&A

Thank you!



For more information visit

→ <https://spacesolutions.esa.int/>

→ <https://business.esa.int/funding/intended-tender/space-for-tourism>

