



**April 2019**

This update includes news of more operational and cost changes, especially in Italy and Amsterdam. The absence of proper consultation and adequate notice of significant change is highly problematic. We share members' frustration with the situation. Please continue to report impact on your business and program design so we have a better understanding when we speak to both attractions and policy makers in destination. Thank you to all those members in market who continue to pass on valuable information.

## Policy

### **Brexit**

Following the UK's request to extend Article 50, the UK's departure from the EU has been delayed beyond 29 March. Should the draft withdrawal agreement be ratified by UK Parliament the UK will leave the EU on 22 May 2019. If not agreed the UK must set out its next steps such as a request for a further extension or leave the EU without a 'deal' on 12 April.

We have published a page on Brexit [here](#) outlining the guidance published by the European Commission and UK Government in the event of a 'no-deal' which is currently the default scenario. Information on the UK's proposed long-term immigration strategy is also included which would start from 2021 with or without a 'deal'.

Please continue to contact [policy@etoa.org](mailto:policy@etoa.org) with any specific questions you may have.

### **Visa Policy**

We are awaiting conclusion of 'reading' and 'budget' stages at the European Parliament to put into effect the changes to the Schengen Visa Code.

### **Long-haul travel sentiment survey & Index**

Latest research by [European Travel Commission](#) on intention to travel to Europe from US and China in 2019 can be found [here](#). The research is part-funded by ETOA.

# Destinations

## Netherlands

**Amsterdam Guiding:** [Amsterdam Gemeente issued a press release](#) on 20 March revealing a ban on walking tours in the Red Light District (RLD) from 01 January 2020 as well as other restrictions. We believe [this webpage](#) will be kept up to date with information. The ban is currently being formalised by the Gemeente – we are seeking operational clarification. Below are main changes.

- Group walking tours (over 4 people) in the RLD will be banned from 01 January 2020. This does not include the entire De Wallen area, but only by sex workers' windows.
- Group sizes in the city centre (excl the RLD) will be decreased to 15 people, currently it is 20.
- Free tours and offering services to consumers in the street without official accreditation will be prohibited.
- Participants in a tour are liable for a tax. The current tax on city sightseeing buses and canal cruises is €0.66 per person.
- The City will, in consultation with the industry, introduce an official accreditation for tour guides that can only be gained if the guides fulfill certain requirements.
- Guides that offer tours in the centre, but beyond the RDL may also need accreditation in due course; this is currently not the case.

General information about current rules for guiding in De Wallen area can be found [here](#).

In banning organised walking tours within the RDL and proposing further restrictions in a wider area, it is clear that Amsterdam authorities have decided that organised tours of any size are a significant contributor to over-crowding, that groups cause nuisance, and that sex workers are adversely affected by group tourism. The Gemeente's apparent priority is to prevent the windows where sex workers are visible from being treated as a commercial tourist attraction. This appears not to recognise the area's broader cultural and historical appeal.

The impact of these moves are drastic: an entire suite of product delivered in a public place has been banned by an administrative act. This affects businesses, guides and clients. Issues of fairness arise as non-organised groups and individual visitors cause nuisance; the RDL will continue to attract them, and they will be free to visit. In requiring guides to have a permit elsewhere, the city is using commercial control to regulate activity; guiding itself remains an unregulated profession in the Netherlands.

Strongly diverging opinions on the merits of this policy and the consultation process that led up to it are evident. ETOA understands that a legal challenge is in preparation. If members wish to learn more, in confidence, they should email [policy@etoa.org](mailto:policy@etoa.org). Our next scheduled meetings in Amsterdam are in the last week of April.

## Italy

**Venice landing fee:** We are in close contact with stakeholders in Venice to get up to date information about operational developments. We understand that the start date for the landing fee may be postponed to June or July 2019 instead of 01 May. We are seeking official confirmation. In addition to information provided in previous updates, authorities have a new document with more information. Please [click here](#) to download. Key points include:

- Transport companies will be in charge of collecting the fee. This includes any company, private or public, transporting people for commercial purpose (see Art. 2.3 for details). It is not yet specified how this will work operationally; we are seeking clarification. They will also be in charge of providing information and instructions to visitors.
- For 2019 visitors arriving on a coach paying ZTL will be excluded (see Art. 15 for details).
- For 2020, the rate applicable for specific periods will be decided before the 30th of June 2019. The rate will vary between €3-€10 per day, as previously announced.
- A reduction of 50% applies to visitors spending the night in accommodation in the [Regione Veneto](#) (exceptions will apply during specific busy periods – dates to be confirmed).
- Visitors from cruise ships will be subject to the tax despite previous ambiguity.

**Venice – seminar:** 09 April 2019, ETOA will be hosting a [seminar and panel discussion in Venice on sustainable tourism](#) followed by networking drinks; speakers include academics, policy makers and the private sector. Please [click here to register your interest](#) to attend, registration will close on Tuesday 2nd April.

**Florence:** The **Galleria dell'Accademia** has limited size of groups even further in 2019 to 20 people per group including the guide. Please contact [policy@etoa.org](mailto:policy@etoa.org) for details. We are in contact with the Accademia and Uffizi galleries and seeking to meet with them soon.

**Assisi - Basilica of San Francesco:** A booking fee is now applicable for groups visiting the Basilica, regardless if the visit is guided or not. [More information can be found here](#). For non-guided visits, the fee is €1 per person, which must be paid [online](#). It is currently also possible to pay the fee at the Information Office, located off the Lower Plaza of the Basilica, but we have been informed this may change; we will monitor the situation closely. The visit must not exceed 35 minutes. The fee for guided groups remains unchanged at €2 per person. The official explanation is: *"To ensure the organisation and flow of groups inside the Basilica during the whole day"*. We are seeking clarification with the Basilica to understand why non-guided groups are charged, but individuals are not.

**Rome - Colosseum & Roman Forum tickets:** Parco Colosseo have released new ticket prices and changes. Below are the main changes, which were announced at a press conference on 11 March. Not all information is available online.

- The basic ticket for Colosseum, Forum & Palatino will increase from €12 to €16 from 01 November 2019 - not from 01 July as previously announced. From 01 July 2019 this ticket will only be valid for 24 hours compared to current 48 hours.
- A new [Forum & Palatine ticket](#) has been announced which costs €16. The Colosseum is not included but there are a number of other sites inside Palatine and Forum which are normally off limits which will be included. It's been designed for the more in-depth tourism.
- The Full Experience ticket including Colosseum, Forum & Palatino (including normal off-limit sites as above) valid 48 hours is €22.
- An additional ticket office at Colosseum will be added mid-season to limit queues.
- They are working on improvements to the bathroom facilities.

Some operators have experienced issues with their reservations for some of the new sites inside the Forum. This may be teething issues, but please contact [Tini Gattazzo](#) if you continue to experience this.

**Rome coach access:** Clarification is still being sought on various questions from [Roma Mobilita](#). We are in close contact with stakeholders and members to understand

operational challenges and have attended various meetings and conferences exploring developments and solutions. Members report how they have either removed Colosseum from their itineraries or how they are worried about missing their time slots due to lack of drop-off options and complicated booking systems. We would like to hear from our members about your challenges with the new system. Please contact [Tini Gattazzo](#) if you would like to be involved.

## Ireland

In July, Ireland will host 2 major golf tournaments at courses near to the [Cliffs of Moher](#) and [Giant's Causeway](#). Traffic management plans will be in place and delays possible.

**1-7 July Irish Open at Lahinch, County Clare** – The official traffic management plan will be published soon but the Cliffs of Moher have informed us that access is likely to be prevented from Lahinch. Travelling from the south, access to the Cliffs of Moher will be from Ennis on N85 continuing north through Ennistymon on N67 before turning left at Lisdoonvarna for R478. Access from the north is not restricted.

**14-21 July The Open Championship at Portrush, County Antrim** – The official traffic management plan is published [here](#). Access is not prevented to any attractions on the Causeway Coast, but road closures will be in place. Nearly 200,000 spectators are attending the event so traffic will be busier than usual.

## England

**London - ULEZ:** On 8 April 2019, the ultra-low emission zone (ULEZ) will start covering the area of the congestion charge zone. This is applicable every day for both UK and non-UK vehicles and replaces the current T-charge scheme. Coaches will need to comply to Euro VI emissions standard or pay a charge of £100 per day. Minibuses, private hire vehicles and cars will need to meet Euro 4 Petrol or Euro 6 Diesel standard or pay a charge of £12.50 per day. The daily charge is the same whether entering the zone once or multiple times per day (payable [here](#) from 8 April) and is lower than a penalty charge. If a vehicle is parked in the zone and does not move, no charge is payable.

On 26 October 2020, ULEZ will be expanded to the current [LEZ](#) for coaches. This covers most of the area within the M25 including Heathrow Airport. Coaches not meeting Euro VI but complying to Euro IV and V standard will be liable to a charge of £100 per day or £300 if Euro IV standard not met.

On 25 October 2021, ULEZ will be expanded to the boundary of the north and south circular roads for minibuses, private hire and cars.

For more information including a post code checker to see if a visitor attraction or hotel is within a clean air zone, click here for [ULEZ](#) and [LEZ](#).

**London - ETOA's first 2019 Group Tourism Working Group** will take place in London in our new offices on 02 May 2019. The purpose of this working group is to understand general challenges for group tourism and operational updates throughout Europe. If you would like to hear more, please contact [Sofie Jensen](#).

**Bath - Clean air zone:** Councilors have approved a plan for a clean air zone to be implemented (target start date December 2020). The exact boundary of the zone is to be confirmed but will include the city centre. Coaches will need to meet Euro VI emission standard and minibuses and private hire vehicles Euro 4 Petrol or Euro 6 Diesel. Failure to comply will result in a daily charge of £100 for coaches and £9 for minibuses and private hire vehicles. Private cars are exempt from the scheme. Further details will be communicated in due course once known.

## France

**Eurostar services** have been affected by weeks of industrial action by French Customs at Paris Gare du Nord. For the latest updates on cancelled services please see [here](#).

**Gilets jaunes - Paris:** disruption due to public demonstrations continues, and on the days in question some program adaptation may be required. We are in touch with the authorities in Paris. The Préfecture de Paris publishes news of traffic control measures [here](#).

**Paris networking drinks:** This evening (27 March) we are hosting [networking drinks reception](#) in Paris to celebrate our 30th anniversary. If you have not yet registered, but are interested in attending, please email [Yamin Saadi](mailto:Yamin.Saadi). Please note that numbers are limited. Venue is [La Bonne Franquette](#) in Montmartre, the reception starts at 18:30 and attendance is free for members and non-members from the travel industry. The next Paris working group meets on 28th March.

## Scandinavia and the Baltics

We are setting up a **Nordic Contact Group** focusing on tourism developments in the Baltic countries and Scandinavia. We are looking for interested members who are either bringing clients to the region as well as suppliers and DMOs. The intention is to create a network of stakeholders discussing topics such as sustainable tourism, seasonality, product development, operational challenges and selling to long-haul markets. If you would like to hear more about this initiative, or if you have a colleague based in the region, please contact [Sofie Jensen](#).

## Events

### Past

- 05 March, Berlin: ETOA spoke at a panel discussion about sustainable tourism at the Arival conference.
- 06 March, Brussels: ETOA was the industry representative speaking at the European Council, Working Group on Competitiveness and Growth – Tourism. Presentation focused on strategic challenges in the context of the EC's current preparation of a Multi-Annual Financial Framework (MFF - the next EC budget).
- 07 March, London: ETOA met with the UK Department for Transport on preparations for Brexit concerning coach operations.
- 08 March, Berlin: ETOA spoke at a panel discussion about Brexit and its potential impact on travel and tourism at the ITB conference.

### Upcoming

- 01 April, London: English Tourism Week Conference - ETOA are joining a panel to discuss the UK's tourism manifesto and opportunities and challenges for the sector post Brexit.
- 01 April, London: UK Parliamentary reception – Held at the Houses of Parliament, members are welcome to attend to meet UK MPs and industry stakeholders. Please contact [policy@etoa.org](mailto:policy@etoa.org) for more information.
- 03 April, Bucharest: ETOA will be speaking at the conference '[Sustainable Tourism - Common Policies of EU Member States](#)' arranged by Romania due to their Presidency of the Council of the EU on the subject 'The role of the private sector of the tourist industry for the 2030 Agenda'.
- 04 April, Paris: ETOA will speak at an event focusing on Chinese incoming, organised by Europass.

- 08-09 April, Krakow: ETOA will be speaking at the [5th European Congress of Local Governments](#) on the subject 'How to Develop Tourism in Historic Cities'.
- 11 April, Brussels: European Alliance for Coach Tourism (EACT) - meeting of industry stakeholders from across Europe discussing city access, driving regulations currently being debated in the European Parliament and Brexit.
- 16 April, London: ETOA will attend the Visit Britain working group - meeting of industry stakeholders and UK Government discussing operational issues affecting the UK inbound and outbound sectors.



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