



BETTER TOURISM IN EUROPE

A YEAR IN REVIEW 2019





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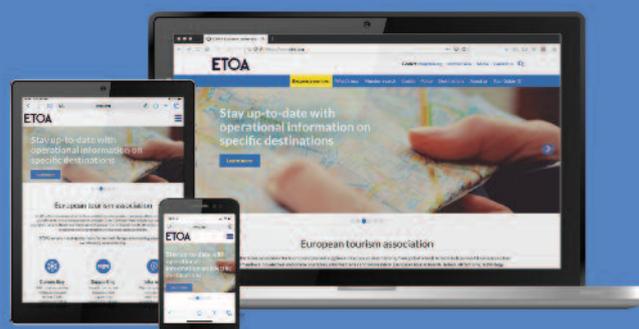
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Recognising our sponsors and industry partners, whose support helps us to help our members

Visit our new and improved website:
www.etoa.org



CHAIRMAN'S FOREWORD



ETOA HAS ACHIEVED MUCH SUCCESS IN 30 YEARS. BACK IN 1989, EUROPEAN INCOMING BUSINESS HAD NO REPRESENTATION IN EUROPE. OUR MAIN CONCERNS WERE VISAS, TOMS VAT, THE PACKAGE TRAVEL DIRECTIVE AND TOUR GUIDES' FREEDOM TO WORK.



BY MARIO BODINI
CHAIRMAN, ETOA

To shift regulatory positions requires a constant dialogue with legislators. To this end, I am delighted that we now have an office in Brussels. There have been noticeable interventions.

With tour guides, we launched an ID card in 1998 and this year alone we have issued 2,500 of them. In 2003 we triggered a national veto to stop VAT legislation that would have damaged the inbound industry. And in 2014 we went further, to push for VAT refunds for UK wholesalers.

In 2009 ETOA stressed the negative impact of mega events. This was extremely controversial, but our advice saved many businesses from major mis-investment.

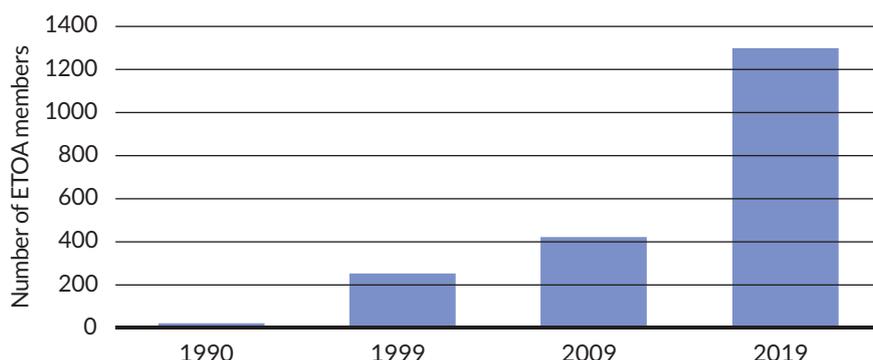
ETOA has been highly active in the event space and since 2015 it has been working with the European Commission to promote China as an origin market. We did this with nine workshops in Europe and China.

In 2016 we began our working groups in transport, cities, destination markets, etc. These now total five, with more to follow.

There are new challenges ahead. Europe will continue to grow as a destination with new source markets and changes in booking patterns. Destinations and itineraries will change, as the trend shifts further towards experiences. This means not just what visitors see, but what they do and who they meet.

Visitor preferences in accommodation will change and there will be a further move towards FIT travel. Online reviews and social media will influence visitor actions. These will be exciting transformations and I am certain that ETOA will rise to the opportunities these changes will create.

OVER 30 YEARS ETOA MEMBERSHIP HAS GROWN STRONGLY





OUR VISION AND MISSION

OVER THE PAST 12 MONTHS, ETOA'S SENIOR LEADERSHIP TEAM, ITS BOARD OF DIRECTORS AND ADVISORY COUNCIL HAVE BEEN WORKING ON THE ORGANISATION'S FUTURE DIRECTION. AS PART OF THIS PROJECT, WE HAVE UPDATED OUR VISION, MISSION AND GOALS.

OUR VISION

- Better tourism in Europe.

OUR MISSION

- To be the first place our members go to for support, expertise and networking connections.
- To enable a fair and sustainable business environment, so that Europe remains competitive and appealing for residents and visitors.

OUR GOALS

- Increase our influence at European, national and local levels.
- Provide excellent services to all stakeholders.
- Grow revenues to support and expand ETOA's work.

We aim to contribute to the sustainable development of tourism in Europe, so that it remains an appealing place to live, work and visit.





Success will come through product development and diversification, better visitor management and capacity optimisation, and joined-up strategy among local and national policymakers. We will continue to support our members by providing a voice for them in these discussions and offering them access to related expertise.

We will keep providing first-class networking opportunities for our members and partners, using the revenues to work towards better tourism in Europe.

“WE AIM TO CONTRIBUTE TO THE SUSTAINABLE DEVELOPMENT OF TOURISM IN EUROPE, SO THAT IT REMAINS AN APPEALING PLACE TO LIVE, WORK AND VISIT”



Visit www.etoa.org/about-us to find out more about ETOA, its secretariat, board and advisory council



Edward Heath, Peter Lloyd-Jones and Nick Tarsh

LOOKING BACKWARDS AND FORWARDS

IN THE 1980s, AN AGENCY SHOT A SERIES OF ADVERTS BASED ON THE SIGHTS, SOUNDS AND IMPLIED AROMAS OF THE BAZAAR...



BY TOM JENKINS
CEO, ETOA

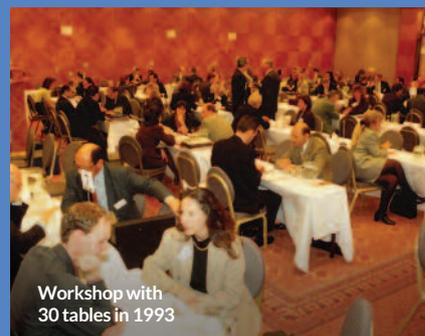
At the eye-level of a child, the camera followed a six year old running through woven materials, hearing coopers hammering, musicians playing, and spices being prepared.

It was enticing and evocative, but it went down very badly with the minister of tourism. "How dare you?" he thundered, "How dare you portray my country as a backward, medieval place. We have one of the largest integrated steel plants in the Mediterranean."

Much has changed since ETOA was founded in 1989. Everyone will point to the impact of new technology; consumers can now research and source products online. They are better informed and, armed with information, can make choices that they could never do before.

Their perception counts; with social media, good (and bad) experiences have

ramifications for suppliers and destinations alike. Problems remain concerning the partiality and significance of online comments: Is the customer real? Is the opinion an outburst from a crank? Who wastes their time posting about an average experience? Yet the volume of what we see is overwhelming. From being among the most ill-informed players in the service economy, tourists are becoming smarter and more influential.



Workshop with 30 tables in 1993

“THE OTHER TASK, WHICH WAS NOT PREDICTED 30 YEARS AGO, IS THE PRESSING ISSUE OF CLIMATE CHANGE. HOW WE MITIGATE OUR IMPACT WILL BE A TOPIC OF EARNEST AND URGENT DISCUSSION”



Stephen Lucas, Daniella Wagner, Lindon Harrison and Borge Ellgaard



Tom Jenkins



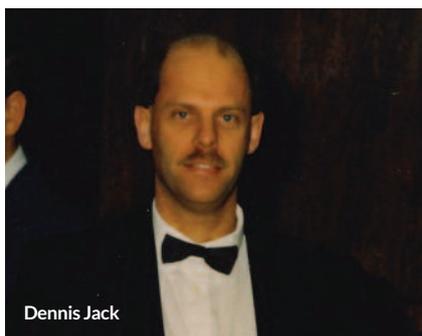
Shibuja-son, Manda-son, Janet Driver and Moriuchi-son



Howard Gibb and David Hosking



Patrick Richards



Dennis Jack

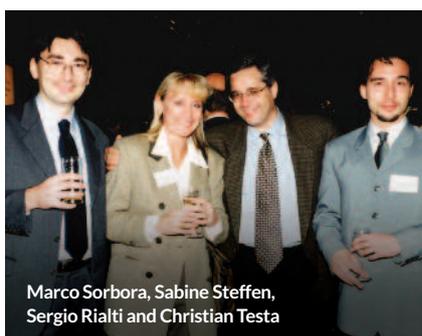


Nigel Huffen

For companies, communication costs have tumbled and connectivity has transformed both operations and sales. FIT bookings can (and sometimes are) run straight out of a hotel's booking system. Staff on the road can instantly be in touch with their office. Clients on group tours can establish contact with their group leader (and vice versa) immediately.

Yet the base desire behind clients' impulse to come here has not changed. They want to see and experience Europe. And still the regulatory concerns that founded ETOA retain their irksome influence.

Visas – though immeasurably better with the introduction of the Schengen visa – remain a block on sales. The Package Travel Directive still effectively stops cross-border sales of packages. VAT is still imposed on the process of selling Europe



Marco Sorbora, Sabine Steffen, Sergio Rialti and Christian Testa

to the world. The freedom of guides to work inhibits operators from delivering the service their clients want. Local taxes are imposed on tourism companies at exactly the point where they add most value to communities.

At the core of this lies a strange continuing impulse in communities (and in government) to kick back at an industry that delivers wealth and underpins the

domestic service economy. This is only exacerbated by the huge success of tourism: the number of international travellers in Europe has trebled since 1989.

Part of the problem is not that tourism is misunderstood by administrations, but that in doing so, they misunderstand themselves. Addressing this and its consequential mistakes, will be a task for ETOA in the next 30 years.

The other task, which was not predicted 30 years ago, is the pressing issue of climate change. How we mitigate our impact will be a topic of earnest and urgent discussion. Insisting on tourism's vital role in underpinning prosperity and the culture of destinations will be central to our argument.

ETOA MEMBERSHIP

SINCE THE BEGINNING OF 2018 WE HAVE MADE CONSIDERABLE EFFORTS TO ACCELERATE THE EXPANSION OF OUR MEMBERSHIP, TARGETING EUROPEAN SUPPLIERS AND GLOBAL BUYERS.



BY COLIN ATKINS
DIRECTOR OF MEMBERSHIP, ETOA

In just 20 months, we have welcomed more than 480 new members in 47 countries. During this period, we have delivered 27 commercial workshops in nine countries.

Our intention is three-fold. We seek to expand the ETOA community to offer a growing network of members who reflect our fast-changing industry and wish to do business together, from start-ups to established players. This, in turn, gives ETOA a louder and more credible voice when representing the industry's needs to local, national and EU governments. Lastly, we aim to improve the day-to-day value of ETOA membership, investing in services such as an upgraded and expanded website, in-market representation and destination working groups.

Member engagement and participation remain central to our success. With your support, we will continue to develop our membership and membership services, as well as the quality and quantity of our events, enabling ETOA to shape the future of tourism in Europe.



1989

The year ETOA
was founded



1,100+

Number of
ETOA members



1,400

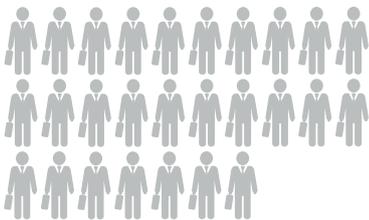
Senior-level decision-makers
within the ETOA membership



SINCE 2018



Free educational and networking events for members



27

Commercial workshops in nine countries



480

New members joined ETOA



€782bn+

The estimated value of the travel and tourism industry to the European economy



5

Countries in which we have a presence (Belgium, UK, France, Spain and Italy)

63

Origin markets served by ETOA members



Visit www.etoa.org/become_member to find out more about the key benefits of becoming an ETOA member



LOCAL ENGAGEMENT

ETOA'S DESTINATION WORKING GROUPS HELP THE ASSOCIATION ENGAGE WITH KEY LOCAL STAKEHOLDERS THROUGHOUT EUROPE.

Tourism is experienced locally, by residents and visitors. Local policy-makers influence how it works. This reality is reflected in ETOA's online destination pages and our destination working groups, which are now active in Amsterdam, Barcelona, Paris and Rome, with more to follow. These are the backbone of ETOA's local engagement. They enable us to stay close to actual business conditions, build relationships with local attractions, and gain credibility with public-sector stakeholders working on tourism and access policy.

Europe's top visitor attractions are struggling with demand, but there are also opportunities to improve processes and visitor experience, and optimise capacity. We have held meetings with

top attractions, including Vatican Museums, Rijksmuseum and Sagrada Familia. To help promote awareness, share practical information and provide more visibility especially to less well known attractions, destination pages can now feature local attractions within ETOA's membership.

We've held 30th anniversary networking events in Amsterdam, Barcelona, Brussels, Madrid, Paris and Rome, inviting members, non-members and local stakeholders. These occasions provided an opportunity for public and private sector guests to talk in informal surroundings and get to know more about ETOA activity locally.



POLICY MATTERS



A SUMMARY OF THE WORK ETOA HAS DONE THIS YEAR TO INFLUENCE EU LEGISLATION AND ENSURE THAT MEMBERS' INTERESTS ARE REPRESENTED.

EU POLICY AND SUSTAINABILITY

The European Tourism Manifesto, of which ETOA is a founder and steering group member, now has 50 members, thanks to the ETC's coordinating work. There is mixed progress to report on Schengen Visas: the good news is that applications will be accepted from six months prior to departure as from February 2020, but documentary requirements remain onerous.

In addition to discussions with the Visa Unit, ETOA participates in meetings of the EC's expert stakeholder group on package travel and its digital tourism network, and supports industry-wide moves to ensure that regulators delay implementation of the payment services directive, because both industry and regulators are not ready for the new payment authorisation requirements. Widespread transaction failure was expected, which would cause significant disruption and consumer detriment.

Cross-border services remain central concerns for ETOA. We have been following the progress of the Mobility Package, which may affect coach driver regulation. The ETOA Tour Guide ID Card has seen a record year – we have issued more than 2,500 cards to guides working throughout Europe, providing professional recognition and support to both operators and individuals.

ETOA contributes to policy debate across the institutions, speaking at the European Council's working group on tourism and the European Parliamentary round table on climate-friendly travel.

At time of writing the new European Commission is still being appointed, with no-one yet responsible for tourism: ETOA and its partners are pressing for recognition of the industry's strategic importance, and the necessity of joined-up tourism policy at EU level.

Sustainability is our top policy priority: from community, industry and visitor perspectives, how to make tourism better – and better perceived.

In April, ETOA ran a seminar on sustainable tourism hosted at the Scala Contarini in Venice, at which local officials responsible for tourism and tax spoke. Content included news of product development initiatives in the Lagoon, away from the main sites, and drew attention to the city's "hidden jewels".

In May we formed a strategic alliance on sustainability with our partners CELTH, ETC and NECSTouR. We have spoken about sustainability at events – from Brussels to Barcelona and Bergamo to Bucharest. Our annual policy summit in Lucerne, 'Tourism in Transition', focused on sustainability, featuring expert speakers from national tourism organisations, academia and the private sector, ending with a workshop focusing on practical ways to tackle "overtourism".

ETOA's Digital City Visitor event, following CityFair in June, featured research and best practice in capacity optimisation, including a presentation of the Van Gogh Museum's successful project to increase visitor satisfaction through visitor-flow management.

We have agreed a partnership with UIC to support its TopRail project, aimed at improving links between the tourism sector and rail, a likely beneficiary of any consumer trends away from intra-European aviation. ETOA's involvement includes awareness-raising among TopRail partners of industry needs in terms of product, booking horizons, ticketing and service.

CULTURAL AND EDUCATIONAL TOURISM

Many of ETOA's operators produce cultural and educational tourism in cities, for groups and FIT. ETOA has been speaking or moderating at related events across Europe – from Debrecen to Lisbon, Oxford to Athens. We also attended our partner ECM's events in Edinburgh and Ljubljana to develop our relationship with city tourism managers.

TAX, TOURISM AND CITY ACCESS

In June, ETOA launched a unique online resource for members, tracking more than 130 European destinations' tourism taxes, sparing operators a very time-consuming task, and enabling better budgeting.

From discussion at Scottish government round tables and OECD working groups to local government across Europe, we remain highly engaged on this topic, and have had significant PR coverage. ETOA spoke at the Workshop on Future of Transportation for International Tourism in Europe, focusing on city access, including the future of coach travel.

BREXIT

ETOA monitors official EU and UK Guidelines, visits key players, including port management organisations, and has developed a one-stop resource for industry online. Following two successful seminars earlier this year, on 31 October 2019 we will run a large-scale industry-preparedness event.



For further information on ETOA's work on policy issues email policy@etoa.org or visit www.etoa.org/policy/activity

ETOA EVENTS

ETOA HAS HAD A RECORD YEAR IN DELIVERING ITS OWN B2B WORKSHOPS AND EVENTS DURING 2019 AND THE GROUNDWORK HAS BEEN LAID FOR AN EVEN BIGGER AND BETTER YEAR IN 2020 AND BEYOND, WITH NEW EVENTS BEING ADDED TO OUR PORTFOLIO.



GLOBAL EUROPEAN MARKETPLACE 2018

Friday 2 November
Intercontinental London the O2
London, UK

Attendees: 244 Buyers/381 Suppliers
Business Meetings: 7,634
Appointment Preferences Assigned: 78%
Satisfaction Score: 80%



BRITAIN AND IRELAND MARKETPLACE 2019

Tuesday 29 January
Hilton on Park Lane
London, UK

Attendees: 112 buyers/113 Suppliers
Business Meetings: 3,497
Appointment Preferences Assigned: 92%
Satisfaction Score: 88%



HOTELIERS EUROPEAN MARKETPLACE 2019

Monday 11 February
Barceló Renacimiento
Seville, Spain

Attendees: 67 buyers/76 suppliers
Business Meetings: 2,090
Appointment Preferences Assigned: 91%
Satisfaction Score: 79%



ETOA events were held in Amsterdam, Barcelona, Berlin, Brussels, Chengdu, London, Los Angeles, Lucerne, Macau, Madrid, Rome, Seville and Shanghai



19,781

Meetings arranged at our ETOA workshops



87%

Average appointment preferences assigned



84%

Average satisfaction score for ETOA events



NEW IN 2020

ETOA is growing its workshop portfolio, with two new events arriving in early 2020, first in Italy with the new VIVA workshop in Rome, then The Nordic Marketplace in Copenhagen.



CHINA EUROPEAN MARKETPLACE 2019

Tuesday 14 May
Hilton Doubletree Shanghai Pudong
Shanghai, China

Attendees: 60 Buyers/79 Suppliers
Business Meetings: 1,793
Appointment Preferences Assigned: 90%
Satisfaction Score: 90%



CITY FAIR 2019

Monday 17 June
Old Billingsgate
London, UK

Attendees: 162 Buyers/177 Suppliers
Business Meetings: 4,767
Appointment Preferences Assigned: 85%
Satisfaction Score: 83%



VIVA ITALIAN MARKETPLACE 2020

18 February 2020
Rome, Italy

International tour operators and travel buyers meet tourism product suppliers from across Italy in a full-day B2B workshop.

SHOWCASE AND WHITE LABEL EVENT CLIENTS

ETOA's support of partners in their event management continues to grow, with a varied selection of clients in 2019 – helping with B2B workshops, training, roadshows, seminars and event services.



GLOBAL TOURISM
ECONOMY FORUM
世界旅遊經濟論壇
FORUM DE ECONOMIA
DE TURISMO GLOBAL



Department for
Business, Energy
& Industrial Strategy



THE NORDIC MARKETPLACE 2020

24-25 February 2020
Copenhagen, Denmark

A first-time opportunity for global tour operators and travel buyers to meet with suppliers from across the Nordic region in a single full-day workshop.





Partnerships in European Tourism



Alongside our partners at the European Travel Commission and ECTAA, during 2017-19 ETOA delivered the European Commission's Partnerships in European Tourism (PET) programme. This initiative aimed to support tourism businesses seeking to expand into the Chinese and US markets. A great accomplishment and learning curve for ETOA, the success of the PET programme should foster a future of similar contracts and partnerships at European level.



13,759

Business meetings arranged at PET events

Delivered by



8 Conferences, B2B workshops and stands at tradeshows in Venice, Berlin, Beijing, Macau, London, Shanghai, Chengdu and Los Angeles



631

Tourism operators from Chinese and US markets

2,000+

PET webinar views

5,982+

PET video views



816

Small and medium-sized enterprises benefitted from PET



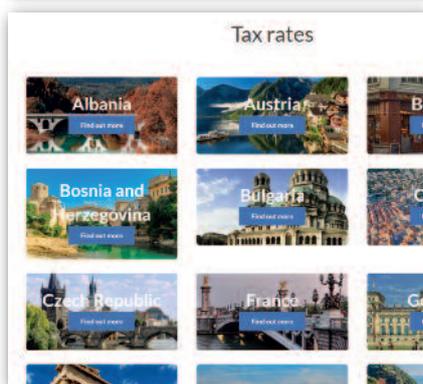
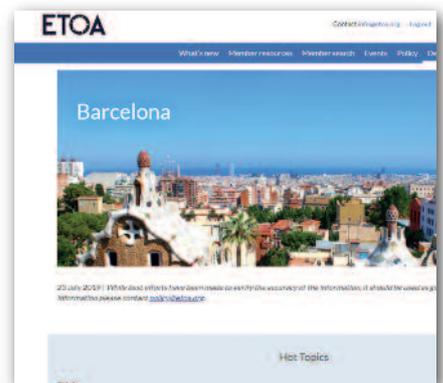
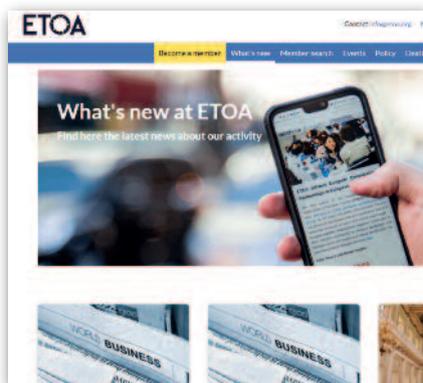
COMMUNICATIONS UPDATE



THIS YEAR WE HAVE LAUNCHED A NEW WEBSITE, REDESIGNED OUR MEMBER COMMUNICATIONS AND SEEN OUR SOCIAL MEDIA ENGAGEMENT AT AN ALL-TIME HIGH.

In the past 12 months the ETOA communications team has:

- Launched a new website with much-expanded sections on policy, destination engagement and tourism taxes. There is increased member-only content, year-round registration for our events, a more personalised member area and better document tagging that makes it easier to find policy papers, EU directives, position papers and presentations. Our new website also features enhanced video content, explaining, in a simple and accessible manner, our work on key issues. Since its launch, we have seen a 15% increase in visitors and a 62% increase in page views.
- Secured more than 330 pieces of media coverage by distributing 23 press releases.
- Increased our presence on Twitter, LinkedIn, WeChat and Facebook. We now have more than 30,000 followers across our social media channels, and an average engagement rate of 8.5% for our LinkedIn posts. Please follow us on these channels if you do not already.
- Redesigned our regular communications bulletins to enable easier member access to the latest news and developments, both commercially and operationally. We now produce a monthly Newsletter, New Members Update and

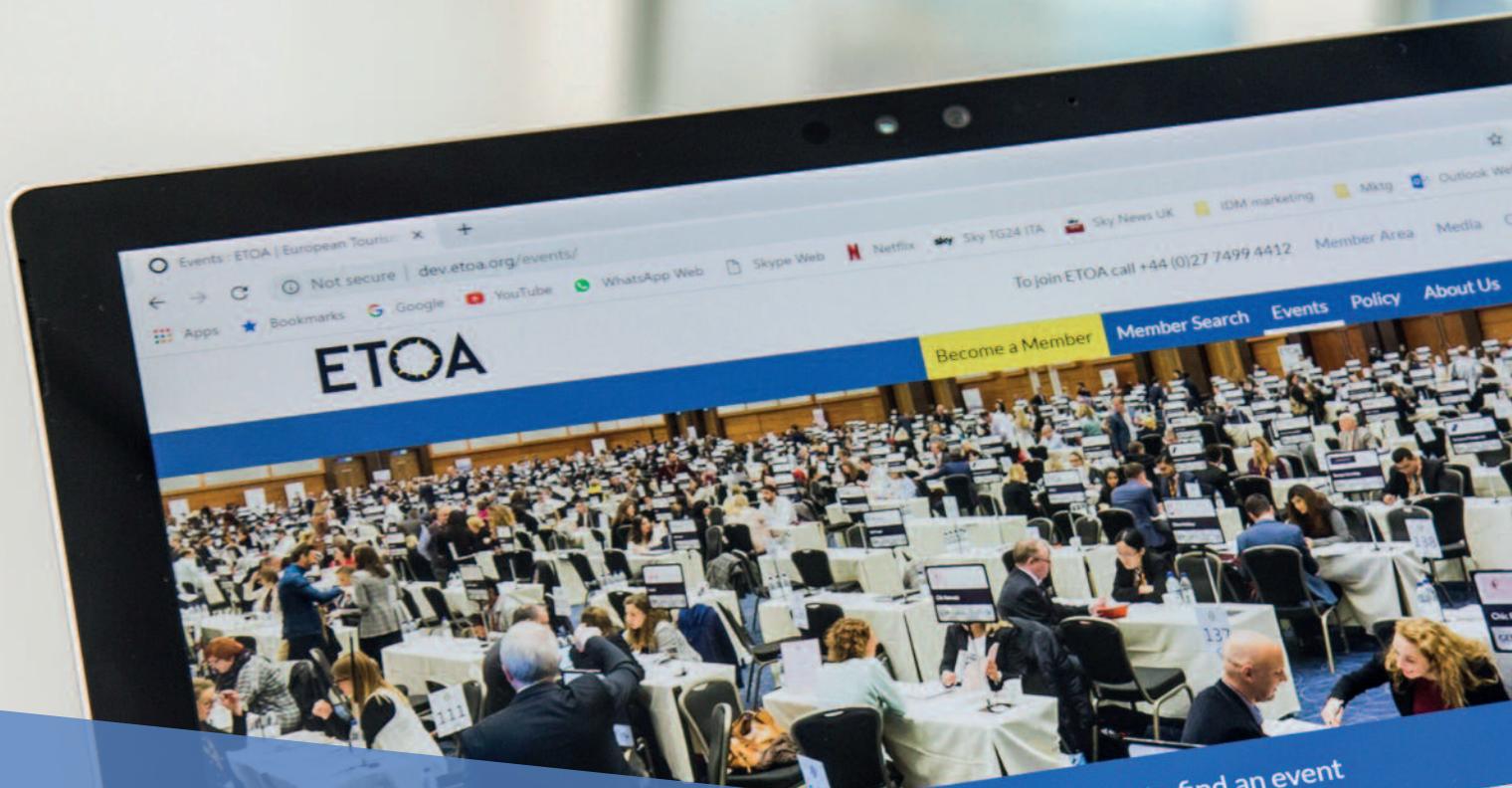


Operators Update to keep our members and partners better informed.

- Sent out 25 bespoke mailings on behalf of our members to promote their products, services and events.



For further information email Rachel Read, Head of Communications, at rread@etoa.org



GET MORE FROM ETOA

Use the filters below to find an event

All Events



JOIN A GLOBAL NETWORK OF MORE THAN 1,100 MEMBERS

If you are not yet part of the ETOA community visit:
www.etoa.org/become_member



ACCESS EXCLUSIVE ONLINE RESOURCES AND CONNECT WITH OTHER MEMBERS

Access our website Member Area at:
www.etoa.org/member-login



KEEP YOURSELF INFORMED ON THE LATEST ETOA NEWS

Sign up for our newsletter at:
www.etoa.org



STAY UP-TO-DATE WITH OPERATIONAL INFORMATION ON SPECIFIC DESTINATIONS

Sign up for the Operators Update newsletter at:
www.etoa.org/operators-update



ACCESS IMPORTANT POLICY INFORMATION

On topics such as sustainability, Brexit, package travel and visas visit:
www.etoa.org/policy



GET NOTICED, BE RECOGNISED

Sponsor an ETOA event
Contact Róisín Donnelly at rdonnelly@etoa.org



STRENGTHEN YOUR B2B STRATEGY

Access additional marketing opportunities
Contact Alberto Valtellino at avaltellino@etoa.org





THANK YOU

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United Kingdom

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