



European tourism association

A photograph of a stone statue's head and hand, with the hand holding a white surgical face mask over the mouth. The background shows a blurred cityscape with European-style buildings. The image is partially covered by a large blue geometric shape that contains the title text.

FIGHTING FOR RECOVERY IN 2021

A YEAR IN REVIEW 2020

www.etoa.org

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European tourism association



CHAIRMAN'S FOREWORD

MARIO BODINI



IT'S BEEN A CRITICAL TIME FOR OUR INDUSTRY. WHAT HAD BEEN EXPECTED TO BE A RECORD YEAR FOR EUROPEAN TOURISM HAS TURNED INTO A NEAR TOTAL FAILURE IN TRAFFIC.

We've had to react accordingly. Internally, we re-organised our staffing to focus on our members' immediate needs. New research was commissioned; webinars organised; a dedicated resource hub for COVID information was established; and new online working groups were set up.

All our workshops (including two new destination-specific marketplaces) were delivered and we rapidly developed an online appointment platform. Such has been the success of this model that Paris, Switzerland and Ireland are using it to run workshops of their own.

We are leaner, but we have to be more effective. To aid this we have invested in a new Salesforce-based CRM system, which should deliver even greater efficiencies and transform our ability to communicate with our members.

We are a membership organisation. We will do everything we can to retain our base of buyers and deliver value to our Associate Members. To this end, we aim to increase our footprint of intermediaries to include more domestic and intra-European operators. ETOA will be well placed to serve the industry when the recovery comes.



“ Working with ETOA on the first 'Meet Switzerland' event was a great pleasure. A virtual event with a competent partner with the right technology is the next best thing to meeting in person. Feedback from our participant operators in the UK and partners in Switzerland was very positive.

Alex Herrmann, Director United Kingdom & Ireland, Switzerland Tourism

CEO'S FOREWORD

TOM JENKINS



WE CANNOT LOOK TO 2021 WITHOUT ADDRESSING THE SCALE OF THE DISASTER THAT STRUCK IN 2020. LOCK DOWN RESTRICTIONS APPEARED, WERE EASED AND RETURNED. QUARANTINE RULES WERE INTRODUCED, RELAXED FOR SOME MARKETS AND THEN REIMPOSED.

The cumulative impact was a collapse in demand, a disappearance of product and an inability to plan ahead: no orders, no supply and no way of knowing when the situation would be resolved. Most ETOA intermediary members have faced a near total lack of business. The luckier ones have suffered a 75% decrease in turnover, but most have seen a drop closer to 95%. It is difficult to stay in business when there is no business to conduct. For many, hibernation seemed the best choice. For others, it was the only option.

ETOA has responded to the crisis by supporting our members in every way we can. Webinars have been run on demand in North America, China and Japan. We are building our intra-European buyer membership to respond to short lead-time tourism from neighbouring and domestic markets. Throughout the crisis we have run a COVID19 information source, with

information on the situation both on a European level and nationally. We have built a new Insight Hub to share research. Working groups online have expanded their scope and attendance enormously. With our partners at USTOA and CATO, we rolled out the TourCare initiative, which aims to reassure clients about their welfare in a pandemic-haunted world.

There will be a recovery. All our surveys of members in origin markets indicate that interest in Europe is robust. Domestic and short-haul demand is expected to be particularly strong in 2021. Most who intended to travel in 2020 have postponed, not cancelled their plans. Underlying demand is present and evidenced through search data. Clients are willing and ready to travel, but they are not yet able. Research suggests risk of quarantine is a bigger deterrent than the virus.



“ Our ETOA membership has been incredibly worthwhile in 2020. ETOA's webinars kept us up to date with market and destination developments, providing necessary insight and useful knowledge from various markets. The COVID platform was enormously helpful, especially when trying to navigate the advice and policies that various governments and health organisations were issuing.

Caroline Achton Friis-Ellis, Business Development Manager UK/US, Greenland Travel



“ During the global pandemic, ETOA's leadership has enabled working group members to collaborate as partners, not competitors, sharing vital resources with each other that have been critical to navigating the current situation in Europe.

Megan Todd, Program Director – Italy, Greece & Turkey, Context Travel

The recovery, along with vaccines and a robust testing regime, will come. It may be gradual, with momentum building up from domestic demand through intra-regional international to the eventual return of long-haul clients. Or it may break like the sun from behind a cloud at midday. To help the industry plan for this, we have expanded the range and scope of our workshops. National and city tourist boards are using our online appointment system to connect buyers with suppliers.

We will still face problems concerning the taxation and regulation of tourism, problems generated by business-as-usual border controls and visas, our sector's environmental impact and other aspects of sustainability. We are working on all of these on local, national and European levels. It is what ETOA was founded to do.



“Our team is grateful to be a member of ETOA. We often join the group tourism meetings, which bring together many different tour operators to discuss challenges and concerns. In turn, this allows ETOA to advocate on our behalf in any areas. We are always well informed with the latest policies and changes in the industry through the ETOA newsletters.

Heather Lawless, Tour Operations Product Manager, Rick Steves' Europe

LONG-HAUL TOURISM IS SORELY MISSED IN EUROPE. ETOA WORKS CLOSELY WITH ITS PARTNERS IN KEY SOURCE MARKETS AROUND THE WORLD WHERE DEMAND FOR TRAVEL REMAINS STRONG.



“2020 will be a year to remember, though many will want to forget. One of the good things to emerge is a closer cooperation

between Associations. We are particularly pleased to have worked with ETOA on a number of initiatives. We have held joint webinars, promoted workshops and formulated the TourCare protocols. We look forward to doing so more in future.

Terry Dale, President and CEO, United States Tour Operators Association (USTOA)



“Cooperation is vital in times of crisis. I am delighted that we have been able to work closely with ETOA in 2020. The partnership that is

evolving is one of the more heartening outcomes from what has been a very difficult year. Europe is a vital destination for Canadian travellers and we look forward to planning for the recovery, which will surely come.

Brett Walker, Chairman, Canadian Association of Tour Operators (CATO)



“It is vital that Associations such as PATA and ETOA work together during times of crisis. The Pacific area retains its huge potential

for growth and we fully expect to see significant volumes of passengers return as soon as confidence is established. We value our partnership with ETOA, particularly in facilitating workshops and promoting the value of inbound Asian tourism to Europe.

Mario Hardy, CEO, Pacific Asia Travel Association (PATA)





EXECUTIVE SUMMARY

FROM THIS IN 2019...



€1.8tn

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



37.1m

Number of jobs supported by tourism in Europe



€553bn

Value of international visitors impact



In visitor spend

6.2%

of exports



Leisure spend

80%

of total

ETOA CONTINUING TO GROW

- Dedicated team of 30
- More than 1,200 members
- 27 commercial workshops delivered in-person in nine countries
- 480 new members
- 17 free educational and networking events delivered throughout Europe
- Biggest-ever IT investment approved for 2021

*Source: WTTC Europe 2019 Key Data, March 2020. USD:EUR converted at 1.12.

TO THIS IN 2020...



VISITOR ARRIVALS INTO EUROPE PROJECTED TO DROP BY AT LEAST 75% IN 2020

- Associated industry job losses of up to 80%.
- A decrease from 37.1m jobs in 2019 to 7.6m by the end of 2020.
- While tourism enjoyed a 2.4% growth in GDP contribution in 2019, the pandemic looks set to reduce that by up to 80% (a loss of €1.44tn from GDP).

Source: WTTC Recovery Scenarios, June 2020. USD:EUR converted at 1.12.



IMPACT ON ETOA AND MEMBERSHIP

- COVID-19 dominated everything.
- Thousands of member contacts furloughed or made redundant.
- Dramatic reduction in income.
- Members struggling to survive.



OUR RESPONSE

- Restructured organisation re-focused on intensive one-on-one member support programme.
- Coronavirus and Insight Hubs launched.
- Intensified lobbying and communication activities.
- Investment in online meeting technology.
- City Fair and GEM moved fully online.
- Regional and white label online event capability developed.
- 41 webinars, briefings and drop-ins with well over 4,000 attendees.



PLUS BUSINESS AS USUAL

- Delivered 26,000 matched business appointments across seven online and in-person workshop events.
- Strategic investment in systems to improve member experience, online profile and build community.
- Intensified lobbying.
- Increased EU presence and engagement with UK government.



“ ETOA has ensured that we are informed, up-to-date and also have our interests represented. Through its working groups and webinars, it enabled a stronger partnership among travel industry peers. We are very grateful to have such a strong and resourceful partner having our back.

Vera Lett, Group Marketing & People Strategy Director, Tour Partner Group (UK/Nordics)



ETOA IN 2021: ADAPTING AND REBUILDING



INCLUSIVITY AND VALUE

- Continued focus on partnership and collaboration with all members.
- Introducing voluntary contributions from our buyer members to complement supplier membership fees.
- More commitment and collaboration requested from operators on events, policy and market intelligence, benefitting all members.
- Major expansion of our workshops and events programme, with member suppliers being offered a wide range of exclusive discounts of up to 60%.
- Supportive conversations with members struggling to participate in our work because of cost.



AMBITION AND DIVERSITY

- Growing our buyer network to increase intra-European and inbound buyer membership, creating a larger and more diverse buyer base for supplier members to do business with.
- Strengthening our policy voice at EU, national, regional and local level to respond more effectively to changing consumer and industry needs.
- Opening up more origin markets and communities than ever before to our work and our supplier members through continued growth of our online capability.
- Maximising mutual benefit with our strategic partners.



VOICE AND INSIGHT

- Fighting for continued sector support for members following the impact of COVID-19.
- Championing the critical role of leisure tourism to Europe's economic and social recovery.
- Development of working groups, online briefings and drop-ins to ensure all members are informed and can input directly to the team.
- New online communities to increase information sharing and networking opportunities.
- Further expanding the ETOA Insight Hub to provide up-to-date research, actionable insights and opinion.
- Establishing a strengthened presence in Brussels, working with partners to build consensus and amplify our voice and impact.
- Intensifying our lobbying activities in five critical areas: sustainability; Brexit; regulation, tax and tourism; destination engagement; visas and borders.



“ Being an ETOA member means being part of an international community where you can find a wide range of companies, from the big OTAs to

niche local companies. In general, we feel that we can really count on ETOA and get the support that we need.

Paolo Fatone, Regional Director – Central, Southern Europe & Middle East, Tiqets



“ There is a clear value in belonging to a like-minded community where all members are invested in a wider goal, beyond the obvious benefits to our own companies. The Nordic

Tourism Collective is the natural local compliment to that, with genuine local expertise and focus and an independent cross-border approach to the Nordics and Baltics, which is precisely matching how suppliers and customers view and sell the region.

Richard Stone, Head of Field Sales, Global Sales and Customer Care, DFDS Seaways

PARTNERS IN POLICY

EIGHT MONTHS INTO THE PANDEMIC,
THE LACK OF INTERNATIONAL
COORDINATION CONTINUES TO
FRUSTRATE RECOVERY AND STANDS AS
A STARK REBUKE TO OUR COLLECTIVE
SYSTEMS OF GOVERNANCE.

At a political level, the European Parliament has been vocal about the need for EU Member States to give tourism sufficient priority. István Ujhelyi, is Vice Chair of TRAN (the Parliament's Transport and Tourism Committee). He serves on the steering group of the tourism task force and is a European Parliament ambassador to UNWTO.



October 2020

In mid-June, more than 90% of MEPs supported a resolution in support of transport and tourism during 2020 and beyond. As MEPs we continue to recognise both the need and urgency for continued support: tourism is a vital job-generator across Europe. Huge effort has been made to keep business going, but it is not enough. We need to persuade Member States to keep the sector going so it survives in good shape to help with recovery.

We need better coordination at European level on policy and long-term funding. For this, we need a better governance framework and process, including the EU institutions and stakeholders from the entire travel and tourism value chain.

Our challenge to our friends in government across Europe is simple – why don't you take tourism seriously? It cannot be treated as a poor relation to other industries. In most cases, it is a larger contributor of GDP. Its cross-cutting nature requires political prioritisation and leadership to ensure that a coherent strategy is delivered.

Collectively, the European Council still lacks political will. Only 10 EU Member States would like to give tourism the status it deserves – not yet a majority. The pandemic has shown the importance of the creation of a "health union" to deliver sufficient coordination. Health, like tourism, is not an EU competence but, like tourism, we need more Europe to make it work in our inter-connected world.

"Europe" as a political community is under stress. Freedom of movement, one of the founding principles of what is now the European Union, is threatened: not by a virus, but by political failure. We must do better than this, and together with colleagues in the Parliament, we will keep up the pressure. Tourism promotes understanding, gives jobs to our young people, and helps preserve culture and community identity through the revenue it brings.

ETOA is one of the most credible voices of industry in Brussels. Its members deserve our appreciation, and our practical support.

István Ujhelyi, MEP

EUROPEAN
TRAVEL
COMMISSION

October 2020

As head of an international tourism organisation, and a National Tourism Organisation in Portugal, I know about the political challenges, but I also know that tourism can help achieve political goals. It is the opportunity to capitalise on this fragile momentum, speak with one voice and ensure that our key messages, supported by the industry, are heard.

Firstly, we need to establish harmonised travel measures and restore Schengen integrity. European tourism simply cannot afford to have inconsistent and constantly changing national approaches. Quarantines are disruptive, unhelpful and should be urgently and collectively replaced by comprehensive cost-efficient measures, such as testing upon departure based on an agreed EU testing protocol and coordinated tracing systems. We need to work to mitigate the impact of Brexit: the UK is the EU's largest source market as well as a popular destination.

Secondly, tourism must be firmly anchored in the recovery and resilience plans of all EU Member States. Investing in tourism provides long-term benefit to communities, visitors and business. Investing in tourism provides long-term benefit to communities, visitors and business throughout Europe. We need to urgently help tourism micro-enterprises and SMEs, family-run businesses – the backbone representing more than 80% of the industry – to easily access the necessary funding to allow their survival and help rebuild their activity in a digital and environmentally friendly way, with a clear focus on people: locals, visitors and workers. It is also critical to support destinations increasing their budgets for product development and promotion to attract more intra-EU travellers in short/medium-term, as well as long-haul visitors.

Finally, even though triggered by such a dramatic crisis, we have a real opportunity now to reinvent the tourism sector. We have been talking for too long about sustainable growth, climate change, digitalisation and innovation. This is a real opportunity to press the reset button, challenge pre-established models and address these matters seriously by defining ambitious goals and implementing effective action plans. Our mission is to champion tourism as a key element to regenerate our countries, in addition to our long-standing commitment to safeguard the competitiveness of the EU as a destination.

ETC, together with ETOA and other partners in the Tourism Manifesto, are arguing strongly for this. ETC stands ready to work with the European Commission, EU governments and all stakeholders to overcome the present challenges and pave the way for the responsible, sustainable and innovative tourism ecosystem of tomorrow. There is a big political prize, if we can seize it. Done well, tourism is one of the best engines for transformative and sustainable economic development, and it will need political leadership and support.

The crisis is also an opportunity, a time for re-imagining how public-private collaboration can work in the interests of visitors and host communities, and we look forward to working with our friends at ETOA on this vital effort in the years ahead.

Luís Araújo
President, European Travel Commission



The European Travel Commission (ETC), with its membership of 33 national tourism organisations, is ETOA's biggest strategic partner in Brussels. ETC was founded in 1948 as part of the Marshall Plan, which recognised that tourism would be an essential element in Europe's post-war economic and social reconstruction. Luís Araújo, its new President, shares his perspectives on what role tourism must play now, and what support it needs.

ABOUT US

ETOA IS THE TRADE ASSOCIATION FOR BETTER TOURISM IN EUROPE. WE ENABLE CONNECTIONS, NETWORKING AND BUSINESS OPPORTUNITIES BETWEEN OUR MEMBERS TO HELP THEM THRIVE.

We work with policymakers to enable a fair and sustainable business environment, so that Europe remains competitive and appealing for visitors and residents. We fight to ensure tourism can support Europe's economic recovery with business opportunities, political recognition, strategic investment and long-term planning.

Our flat structure and funding model has kept us independent, agile and solely accountable to our members for more than 30 years.

ETOA offers an unparalleled networking and contracting platform for all tourism stakeholders, from its policy activity to a range of events that collectively deliver more than 46,000 one-to-one appointments every year. We are here to help our members do better business in Europe.

Members include tour and online operators, intermediaries and wholesalers, European tourist boards, hotels, attractions,

technology companies and other tourism service providers, ranging from global brands to local independent businesses. We are connected to more than 30,000 industry professionals across our social media channels. Throughout the COVID-19 crisis, we have welcomed new members and partners.

This year we've had unprecedented access to tourism policy makers, with member insight feeding directly into crisis management and recovery discussions at all levels. We began 2020 with more than 1,200 members serving 63 origin markets. Our direct membership model gives us a credible and powerful voice at local, national and European levels. From local destination engagement to EU regulatory review, we are present and effective.

We have offices in Brussels and London and representation in destination markets.



“ ETOA has always proven to be a powerful and exceptionally useful resource for us. We're glad to take part in ETOA's well-organised events, which provide great results for networking and business opportunities.

Work groups have also helped us to better understand national scenarios, especially in difficult times like these.

Laura Caponi, Senior Regional Manager, Musement



VALUE OF MEMBERSHIP

THIS YEAR HAS SHOWN JUST HOW HARD THINGS CAN GET. WE ARE FULLY COMMITTED TO HELPING OUR MEMBERS TO GAIN MORE OPPORTUNITIES, INSIGHT AND INFLUENCE BY BEING PART OF OUR COMMUNITY.

Our purpose is to ensure that our members get real benefits from their membership through our events, networking opportunities, research and policy work.

We are committed to delivering lasting membership value, which demands that we continually find new ways of ensuring a return on members' investment. Associates can drive new buyer recruitment through targeted referrals, and the shift to a more collaborative, participatory model of buyer

membership will generate more actionable market insights and intelligence.

Collectively, this will build on the strong sense of solidarity and mutual reliance that has developed through the crisis. We have a common cause and are stronger together.

Many operators, given the unprecedented opportunity to continue membership in 2021 through voluntary contributions, have already committed to support ETOA financially.

As many businesses are working with smaller teams, it is more important than ever that we help to save time: from updates on further travel restrictions, city taxes and border restrictions to more information about members online, we continue to invest in systems and online resources that will deliver a better service.



MORE OPPORTUNITY TO DO MORE AND BETTER BUSINESS

- ETOA events and database connect the widest range of buyers and suppliers in the market.
- Networking and information sharing through online drop-ins, briefings and working groups.



MORE INSIGHT AND SUPPORT TO HELP OUR MEMBERS MAKE BETTER DECISIONS

- Insight Hub and a range of other member-only resources online, plus expert webinars.
- Direct support from the Secretariat, with access to expert advice.



MORE INFLUENCE TO ENSURE THE VOICE OF OUR MEMBERS IS HEARD

- Leisure tourism is newly in favour: it will recover faster than business travel and MICE.
- Strong voice to fight for the interests of our members: diverse membership plus smart collaboration with strategic partners gives us credibility and impact in Brussels, origin markets and across Europe.

ETOA – OUR MEMBERS' COMMUNITY

VOICE AND INSIGHT

THROUGHOUT 2021, WE INTEND TO CONTINUE TO INCREASE CAPABILITY AND INFLUENCE THROUGH ENHANCED COLLABORATION AND COMMUNITY BUILDING AMONG OUR MEMBERSHIP. THIS WILL ADD SIGNIFICANTLY TO WORK CARRIED OUT IN 2020.

More communications and investment in systems development has increased awareness of ETOA among external partners and other stakeholders.

The use of testimonials throughout this review underscores our commitment to make sure we are listening to our members, responding to their interests and using their voice to describe ETOA.



STAYING IN TOUCH

We have engaged with more members than ever. Webinars, working groups and one-on-ones have given us a picture of COVID-19's impact few can match. It has also given a steady stream of ideas: the travel industry is good at solving problems. ETOA's membership community development will be supported by new systems, allowing us to focus our communications and policy activity more accurately on member interests in particular markets and sectors.

Working groups focus on sectors and

destinations and have been run more frequently since March, with attendance growing in most. The online format has made them more efficient and inclusive, shifting from city to national focus, as appropriate. In addition, we have coach transport, group tourism and sustainability working groups. For more information, please email: policy@etoa.org



PR AND COMMUNICATION

ETOA's outreach and profile has grown throughout the crisis. In addition to media coverage in various markets and live interviews, 450 social media actions achieved a reach of 270,000. Our LinkedIn audience has grown by more than 30% since March. At the beginning of November 2020, we had more than 13,000 followers, while Twitter engagement had grown. This has been achieved with a much-reduced team.

New resources were added to www.etoa.org throughout the year. We



added a detailed resources page to our Coronavirus Hub, aggregated operating guidelines and created a "Members' Features" page. Our destination and policy pages continue to be updated.

We have issued 22 newsletters and bulletins since March, in addition to member-only monthly destination and policy updates. We will continue to develop the website and associated analytics to ensure that we optimise value from systems investment. For media archive, visit: www.etoa.org/media

For an archive of our 27 webinars delivered since March, ranging from origin market insights to financial protection, climate action to regional product development, visit: www.etoa.org/coronavirus-hub/webinar-series



INSIGHT HUB

Our Insight Hub presents a rich statistical and insights service for members, partners and stakeholders. It provides up-to-date research, actionable insights and opinion pieces on topics that matter to our members. Inside information from our unrivalled network of buyers will provide the European supply chain with data unavailable elsewhere.

Hub content is also designed to prove the value of tourism to global and local economies, lending weight to our lobbying activities and supporting our vision of "Better Tourism in Europe". Recent member-only additions include an update to the USTOA member survey on advance bookings with American tour, the UNWTO brochure on measuring sustainable tourism and the ETC handbook on Covid-19 recovery for National Tourism Organisations. For more information email: insight@etoa.org



“ ETOA working groups have been immensely useful. It is easy to feel isolated when things are tough, and being part of a team, being able to discuss issues and looking for solutions, is essential. 2020 has been a very challenging year and ETOA has provided us with much needed support and guidance. Our ETOA membership is invaluable.

Michèle Déléaz, Director of European Operations, ACIS



“ During this challenging year, we have learned how cooperation between all stakeholders, stronger partnerships and up-to date communications are crucial. The value of the ETOA membership is exactly that – timely communication, connection with relevant partners and stakeholders – which we believe will continue in 2021.

Kristjan Stanicic, CEO, Croatian National Tourism Board

TOURISM IN EUROPE: ECONOMICS TO ECOSYSTEM

TOURISM HAS ALWAYS MEANT REVENUE AND JOBS. BUT IN THE EYES OF POLICY MAKERS AND MANY COMMENTATORS, 2020 IS THE YEAR WHEN TOURISM BECAME AN “ECOSYSTEM”, ITS INTERDEPENDENCE A CENTRAL CHARACTERISTIC, ITS INTRICATE SUPPLY CHAINS SUDDENLY VULNERABLE.

How would a sector deeply rooted in Europe's small-business culture survive the calamity of COVID-19?

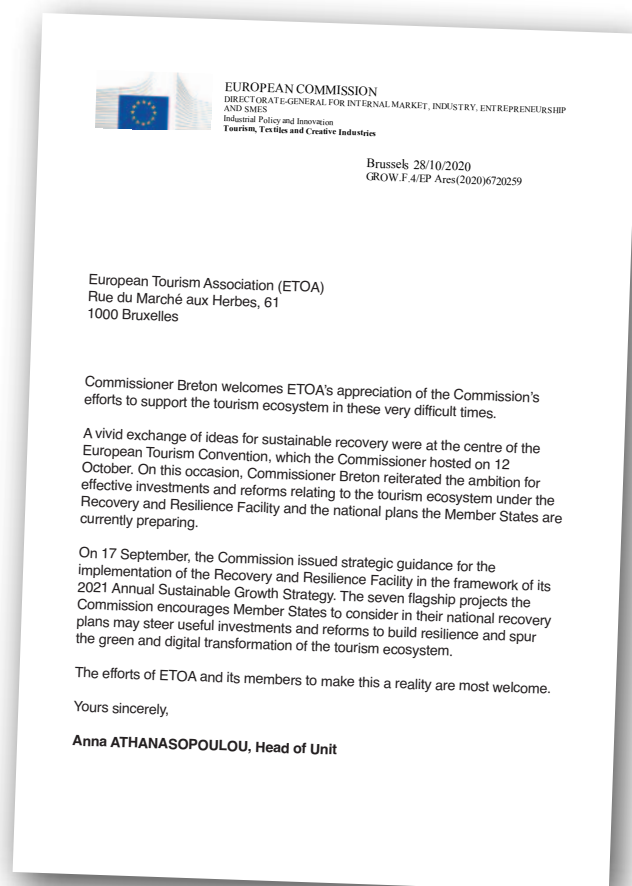
Effective lobbying for such a fragmented sector needs consensus and there has been an unprecedented level of collaboration among stakeholders in Brussels. With ECTAA, ETC, NECSTouR, the Nordic Tourism Collective and our other partners in NET and the Tourism Manifesto, we continue to develop strong, mutually reinforcing partnerships.

Our member-driven insight brings credibility with policy makers and encourages receptivity where previously complacency about tourism was common. The main policy focus over the coming months is to keep up the pressure for financial support and coordination on borders and safety protocols across Europe and with its origin markets. We need a better business environment, locally and across Europe, with policy makers who understand the sectors for which they are responsible.

Travel and tourism have never been higher on the European political agenda. Several hundred billion euros is intended for “recovery and resilience” and all sectors are clamouring for funds. But tourism is different: it is an engine for recovery which, historically, has returned employment to the economy faster than any other sector. With intelligent investment, it can also deliver the transition to a more sustainable economy that Europe intends. Industry's capacity to respond to this strategic policy goal is in sharp focus.

The European Commission has limited formal legal competence over the regulatory areas that most affect crisis management: health policy, transport and temporary border controls are Member State prerogatives. But the need for more coordination has been recognised, and the Commission has been pushing for progress.

ETOA was part of an invitation-only workshop on “safe and seamless” travel ahead of the European Tourism Convention hosted by Commissioner Thierry Breton. The Tourism Unit's head, Anna Athanasopoulou, reiterates the Commission's long-term strategic objectives.



“ ETOA and the Nordic Tourism Collective bring all parts of European, Nordic and Baltic tourism industry together in a unique way, offering the opportunity to collaborate towards future goals. Alone, we can do so little, but together we can do so much – which has never been more true than during this challenging year.

Johanna Berger, Director and Head of Contracted Leisure, BWH | Hotel Group



NORDIC TOURISM
COLLECTIVE

POLICY PRIORITIES

IN ADDITION TO CRISIS RESPONSE, FIGHTING FOR FUNDING AND BETTER COORDINATION, ETOA CARRIES OUT POLICY ACTIVITY IN DISTINCT AREAS OF INTEREST FOR MEMBERS.



SUSTAINABILITY

Tourism's long-term future as a welcome job generator in Europe is closely linked to its capacity to align with the green transition foreseen by the Commission and national governments. As such, it is essential that ETOA maintains a credible and well-informed position.

From the point of view of evidence-led policy, arguably, social sustainability is most challenging. Tourism is still widely misunderstood, especially by local policy makers. Community collaboration and consent is vital in the development of strategic plans for tourism, but so is involvement of industry so that destinations can manage effectively.

Sustainability is now understood to include resilience to external stress, such as the current pandemic. ETOA will be participating in two events before the end of the year, run by the UN's environment agency UNEP and the OECD, which link economic recovery with both climate and public health. This follows a recent ETOA webinar on climate action.

The common thread is mutual interest. Whether it is destinations seeking social sustainability or global climate reduction targets, agreeing what "good" looks like is fundamental to tourism's strategic recovery plans. There will be argument; there must be proper consultation and public-private sector collaboration. ETOA is well positioned to help drive this forward.



BREXIT

From 1 January 2021, travel between the EU and the UK will be subject to post-transition rules. The UK will be the EU's largest external market. This provides opportunity as well as obstacles. Given its strong EU and UK membership, ETOA is well-placed to argue forcefully and objectively for intelligent cross-border facilitation and regulatory alignment. We will continue to provide expert advice as necessary. The first "Beyond Brexit" webinar took place on 19 November. ETOA publishes Brexit guidance at: www.etoa.org/policy/brexit



PACKAGE TRAVEL

The 2015 package travel directive had been in force for little more than a year when Thomas Cook collapsed in 2019. Subsequent financial stress has demonstrated that financial protection frameworks are not fit for purpose. The entire ecosystem collapsed and the risk borne by intermediaries was disproportionate, with large business including airlines withholding refunds.

ETOA is part of the expert group providing industry input to the Commission officials preparing a report on current PTD implementation, due to be published early 2021: we will continue to push for a review.

Given that meaningful change to PTD is unforeseeable within the next few years, other aspects of protection must be addressed meanwhile. The role of insurance and the reassessment of risk allocation between business, the consumer and the state are all in debate. For more information: www.etoa.org/policy/package-travel-regulation





TAX AND TOURISM

From city taxes to VAT, indirect taxation remains one of the most influential factors affecting European tourism's competitiveness. It is also a hot topic in destination funding debates. During 2020, ETOA contributed data and insight to a major study on destination taxes and good practice.

Given the acute stress of public finances, indirect tax-raising capabilities need careful monitoring. We will continue to review and update the city tax database, with most changes expected towards the end or start of a calendar year in our member-only resources at: www.etoa.org/destinations/tourist-tax-rates



DESTINATION ENGAGEMENT

Resistance to tourism's value is still present at local level; visitors are now associated with risk. This is a dangerous precedent and one that requires challenge. Active engagement with local policy makers and DMOs remains at the heart of ETOA's policy work. There are notable successes, including sharp growth in DMO membership in Portugal and Spain, where dialogue with local stakeholders is helping to drive business development and cross border collaboration.

At an operational level, we continue to maintain links with city transport departments, arguing for the value of coach tourism, not least as a safe and low-emission alternative to public transport. For more information visit: www.etoa.org/destinations



VISAS AND BORDERS

This year has seen Europe risk losing its prized freedom of movement because of a persistent fragmentary approach. The urgent need to restore the integrity of the Schengen Area is clear, and recent statements from the European Council indicate that pressure on Member States to agree a common position is growing.

Europe needs its export income from long-haul travellers, many of whom still require visas. For those that enter under visa-waiver arrangements, the expected launch of ETIAS in 2021 may be delayed, but even if not, our expectation is that it will be an easily managed administrative step that should improve experience on arrival. For more information visit: www.etoa.org/policy/visas



“ ETOA and Barcelona City Council have been collaborating for a long time. We value the public-private dialogue, reaching major European operators and communicating public policies. ETOA's role in the private sector allows us to better manage our destination. The updates on tourism taxes of European cities are very useful.

Xavier Marcé, Councillor of Tourism and Creative Industries, Barcelona City Council



“ Madrid Destino has belonged to ETOA for more than 10 years. This gives us the opportunity to interact with tourism professionals from different countries. Also, the fact that such a large number of Spanish DMOs belong to ETOA facilitates the establishment of synergies and collaborations with other destinations.

Ana Sostres, Market Manager Europe, Madrid Destino



For up-to-date information on ETOA policy activity visit: www.etoa.org/policy/activity

EVENTS FOR 2021

ETOA'S EVENTS IN 2021 WILL BUILD ON THE CHANGES AND DEVELOPMENTS SEEN THROUGHOUT 2020. FROM ONLINE DELIVERY TO THE WAY WE APPROACH APPOINTMENT MATCHING, WE HAVE MADE FUNDAMENTAL CHANGES TO OUR EVENT DELIVERY, AS WELL AS SOME MORE SUBTLE REFINEMENTS.

To ensure that we can focus on business matchmaking and avoid distractions posed by the ever-changing circumstances and related uncertainty, all ETOA B2B workshops will take place online until GEM 2021 on 29 October. This approach allows us to widen the breadth of delegates who can attend, while making our events more accessible to those pressed for time who can participate without needing to travel. It also allows us to address multiple destinations, segments

and source markets within the same contracting and product development cycles.

ETOA now has enhanced capacity to deliver events for third parties following the development of our own platform, as an extension to our Celestina appointment-matching system. This integrated approach allows us to reproduce, so far as an online format allows, the focus, efficiency and quality of our in-person events.

UPCOMING B2B WORKSHOPS



**Contracting the best
British & Irish tourism products**
26 January 2021

www.etoa.org/BIM



**European hoteliers
meet global contractors**
11 February 2021

www.etoa.org/HEM



**Meeting the best of Italian
tourism product**
18 February 2021

www.etoa.org/VIVA



**The first truly
Pan-Nordic event**
25 February 2021

www.thenordicmarketplace.com



**Where North America
Contracts Europe**
4 March 2021

www.etoa.org/NAM



**Where China
Contracts Europe**
11 May 2021

www.etoa.org/CEM



**European destination
workshop**
8 June 2021

CityFair.travel



**The most influential
contracting event of the year**
29 October 2021

www.etoa.org/GEM



After each major workshop we review what worked and what can be improved. Not everything went smoothly – browser upgrades proved to be an unwelcome new hazard in event quality assurance – but we are confident and committed to this new event capability and the value it can add to the ETOA community. Rigorous re-testing and refinement resulted in successful delivery of Flavours of Ireland, Virtual Road to Switzerland and the Paris Region USA Workshop as part of ETOA's "white label" event services – providing meetings for almost 400 delegates.

Next year holds great promise for continued expansion of ETOA's Celestina event services programme. Now in its seventh year, ETOA has a good reputation in the delivery of tourism B2B workshops for tourist boards and other associations. The addition of a streamlined online option has extended the appeal and reach of this service and related benefits to DMOs and other partners.



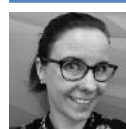
“City Fair timing is very good; we always find buyers full of enthusiasm. The virtual event was so much easier to manage, and during appointments, all attendees seemed truly interested.

Linda McLaren, Head of Sales, AG Group



“It was a good network opportunity connecting with worldwide buyers, discussing the current situation and 2021 projects. We are looking forward to the next event.

Simone Daumas, Senior Sales Manager,
DMC – Tours Val de Loire Tourisme



“These are real buyers with real business. The digital format is very efficient. It is actually better than the face-to-face event. I would not mind having City Fair next year digitally again.

Valgerður Lindberg Jónsdóttir, Sales Manager, GJ Travel



“I had not expected the online workshop to be as good as a workshop where you meet everyone face to face, but it turned out perfectly.

Karin Hoogland, Sales Manager, Keukenhof-Spring Garden, Netherlands



“We were delighted to work with ETOA to host a very successful Flavours 20 online workshop. Our partnership will continue in 2021, increasing opportunities for the Irish industry to connect and grow business globally.

David Boyce, Head of Asia, Middle East & Emerging Markets,
Tourism Ireland

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- 2 Mario Bodini, Chairman, ETOA
- 3 Patrick Richards, Director, ETOA
- 4 Jennifer Tombaugh, Director, ETOA / President, Tauck
- 5 Karin Urban, Treasurer, ETOA / Non-Executive Director, Tour Partner Group Ltd.
- 6 Jean-Claude Balanos, Chairman of Associates, ETOA / Vice President Leisure Sales - Global Sales Division, Accor Hotels
- 7 Sean Taggart, Commercial Director, ETOA

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BETTER TOURISM IN EUROPE