

Destinations
Exchange



ETOA

BETTER TOURISM
IN EUROPE

#DEE24

www.etoa.org

Wi-Fi: Hilton Honors
Code: Honors



AGENDA

- 09:00 Operator and Destination Needs: Aligning interests
- 09:15 Tickets & Attractions
- 09:45 Hotels & Accommodation
- 10:15 Networking Break
- 10:30 Trains & Rail
- 11:00 Insight Session | European Destination Travel Patterns
- 11:30 Peer-to-Peer Conversations | Streams: Visit, Sleep, Move, Do
- 12:15 Lunch
- 13:00 Tourism's acceptance and integration in destination strategy
- 13:45 Managing a Successful Visitor Economy
- 15:00 End of conference
- 17:00 ETOA Spring Party | Hard Rock Cafe



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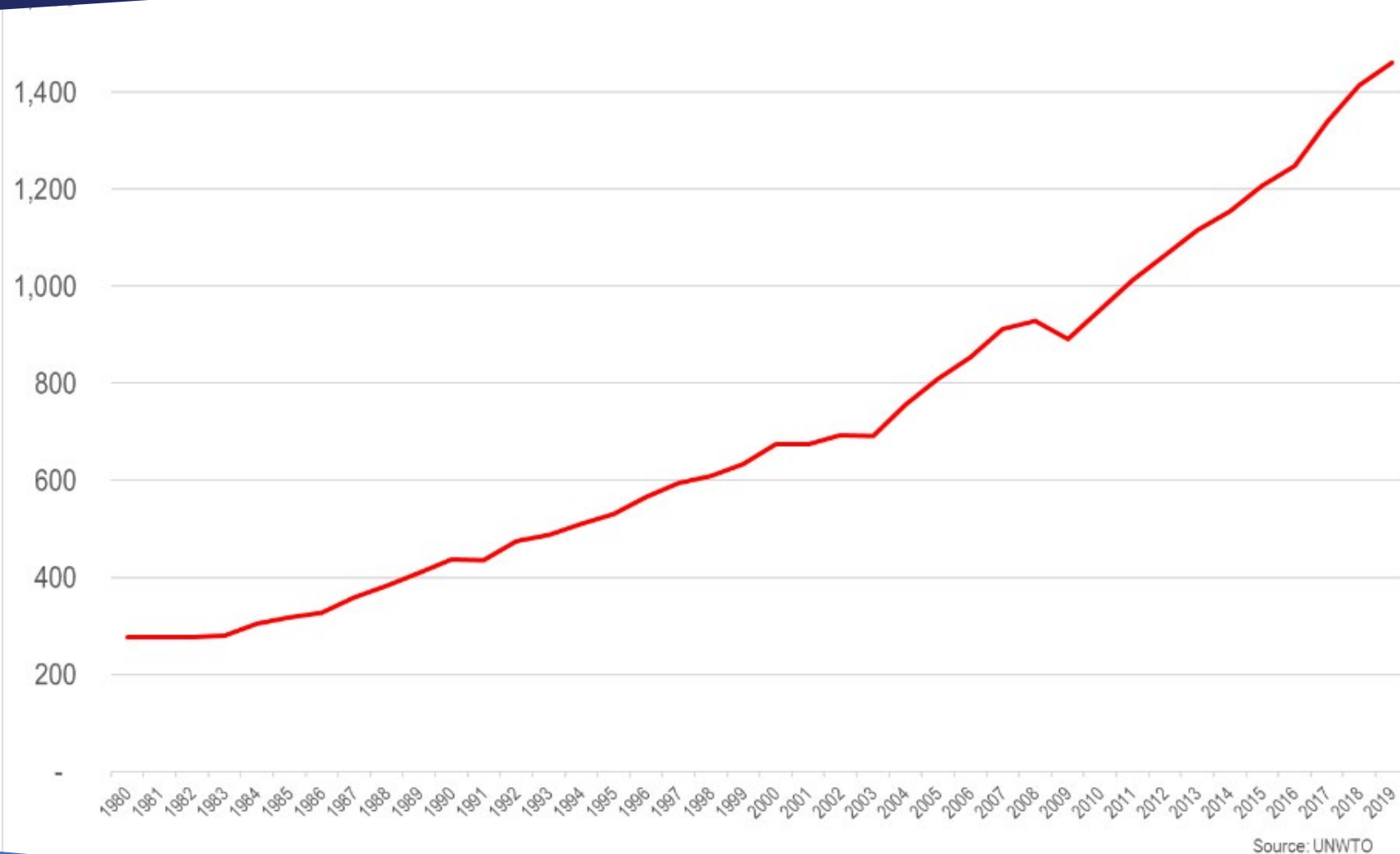
Keynote

Operator and Destination Needs - aligning interests

Tom Jenkins, CEO, ETOA

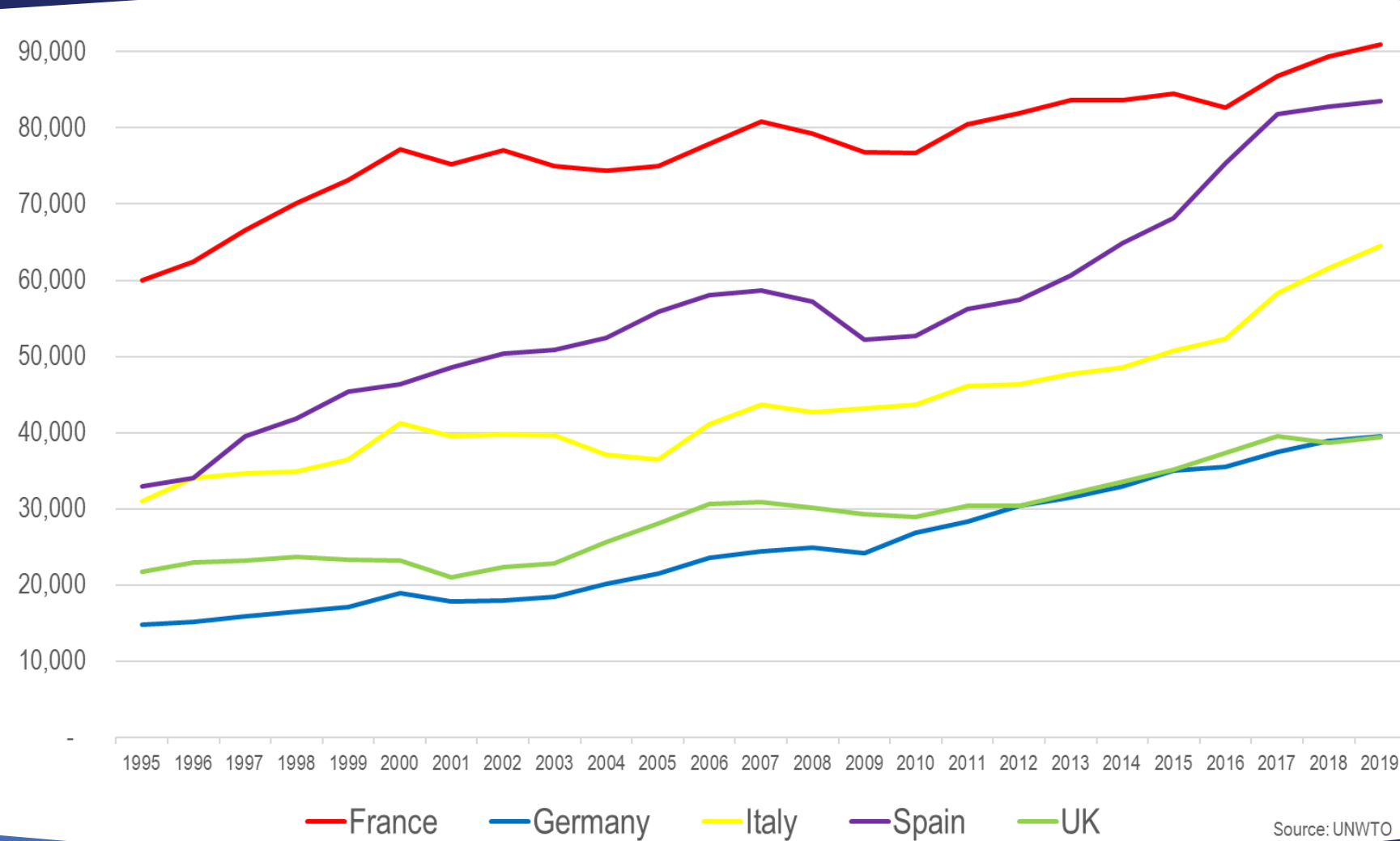


GLOBAL INTERNATIONAL TOURIST ARRIVALS - pre-pandemic trends (millions)



INTERNATIONAL TOURIST ARRIVALS IN KEY EUROPEAN MARKETS (000S)

- pre-pandemic trends



Source: UNWTO

Pressure on capacity not going to go away



- Tourism Taxes
- Price Rises
- Reduction in availability of "premium" Sites
- Exclusion of Group tours
- "Overtourism"

TOURISM TAXES



- Misnomer – not a "Tax on Tourists"
 - Tax on the margins of those whose customers are tourists
 - "Tourists" are customers who can choose
 - Evidence of price elasticity
- Usually a desperate measure by local governments to increase income
 - Very expensive to collect
- Same economic impact as Cartel
 - Only beneficiary is government

"OVERTOURISM" COVERS TWO PHENOMENA



- Overcrowding
 - Broadly self-policing
- Economic displacement
 - Inevitable part of being in city
 - Open to the city to choose what it wants
 - Controls planning

DANGER OCCURS WHEN TWO GET MIXED



- "Need to do something" becomes a political necessity
 - Restrictions on coach access
 - Reductions in group sizes

Both measures increase pollution and congestion

Initiatives are implemented as "anti-tourism" measures

WHAT CAN INDUSTRY DO



- Assert value of tourism to local economy and culture
- Look to see where we can add value
 - Dispersing demand
 - Geographically
 - Seasonally

BALANCING



- Sales are made by presenting clients with what they think they want
- Biggest growth market is from first time visitors
 - Bucket list driven

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Tickets & Attractions

Operator and Destination Needs - aligning interests

- Marie-Charles Houston, Sales Manager, Historic Royal Palaces
- James Wyld, Global Trade Operations Director, Merlin Entertainments Group
- Tim Fairhurst, Director General, ETOA

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Hotels & Accommodation

Operator and Destination Needs - aligning interests

- Shirley Sin, Manager, G2 Travel
- Paolo Meineri, Senior Director Procurement Europe, EF
- Tom Jenkins, CEO, ETOA



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Trains & Rail

Operator and Destination Needs - aligning interests

- Tuesday-Ann Castle, Senior Manager, Eurostar Group
- Enrico Soresini, Founder, Green Globe Railways
- Salim Benkirane, Policy Officer, ALL RAIL
- Tim Fairhurst, Director General, ETOA



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European Destination Travel Patterns

David Edwards, Tourism Insight Expert, ETOA

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European Destinations Travel Patterns

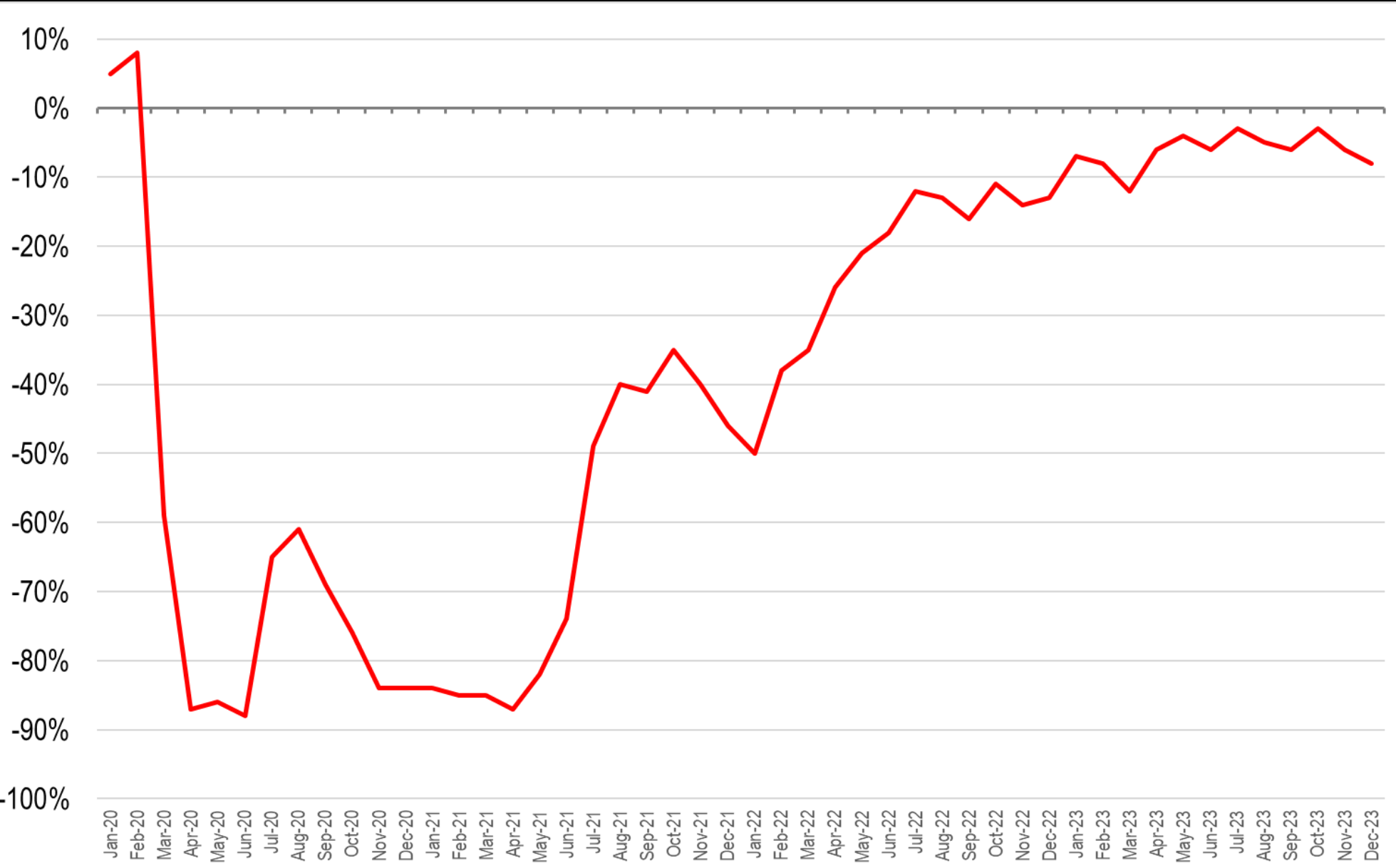
April 2024

Coming up...

- Recent inbound trends
- Origin market performance
- Forecasts
- Factors shaping demand
 - Economics
 - Consumer sentiment
 - Climate change
 - Border formalities
 - Events
- Q&A

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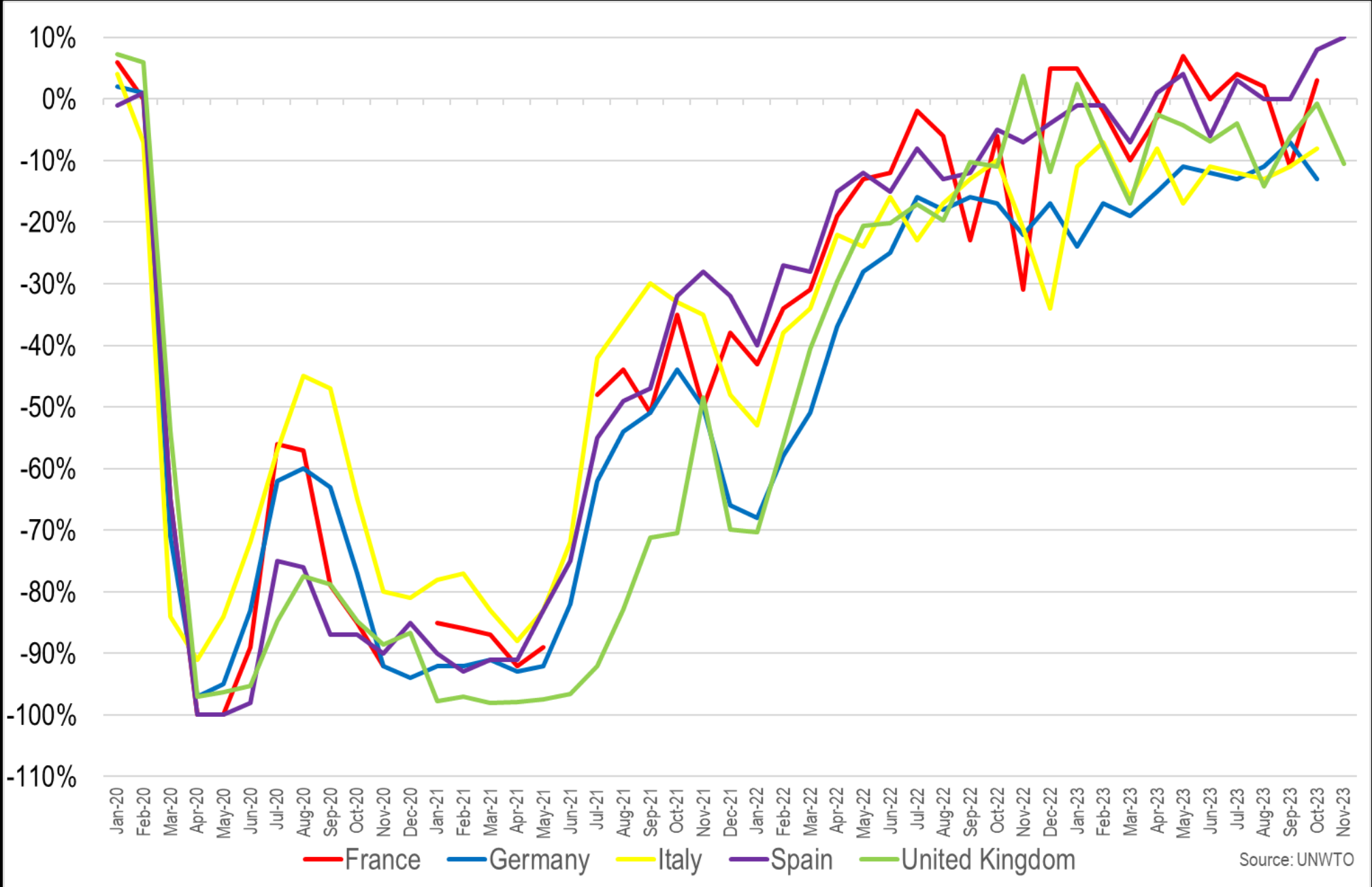
International arrivals in Europe vs equivalent month in 2019



Source: UNWTO



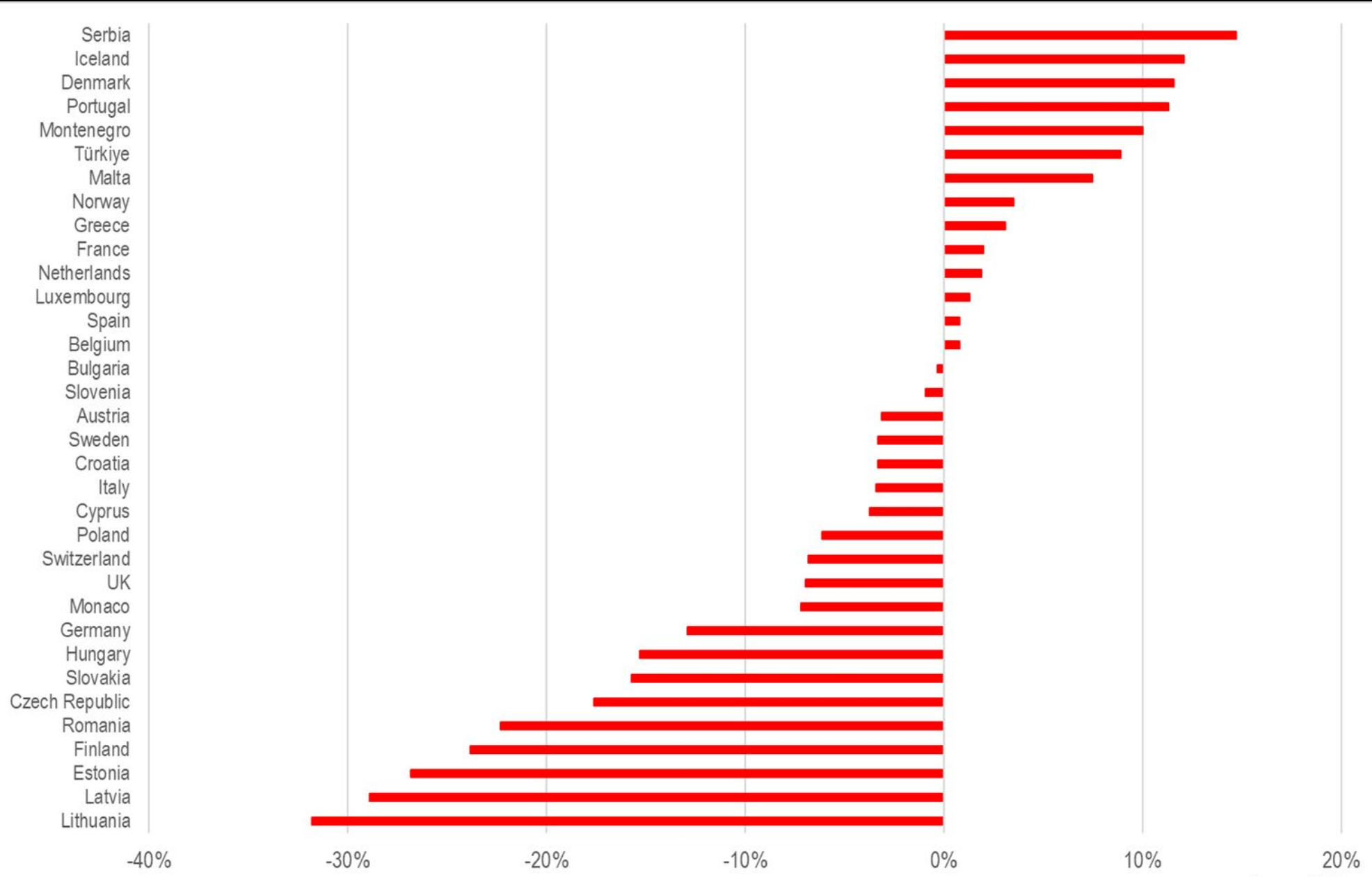
International arrivals in key destinations vs equivalent month in 2019



Source: UNWTO



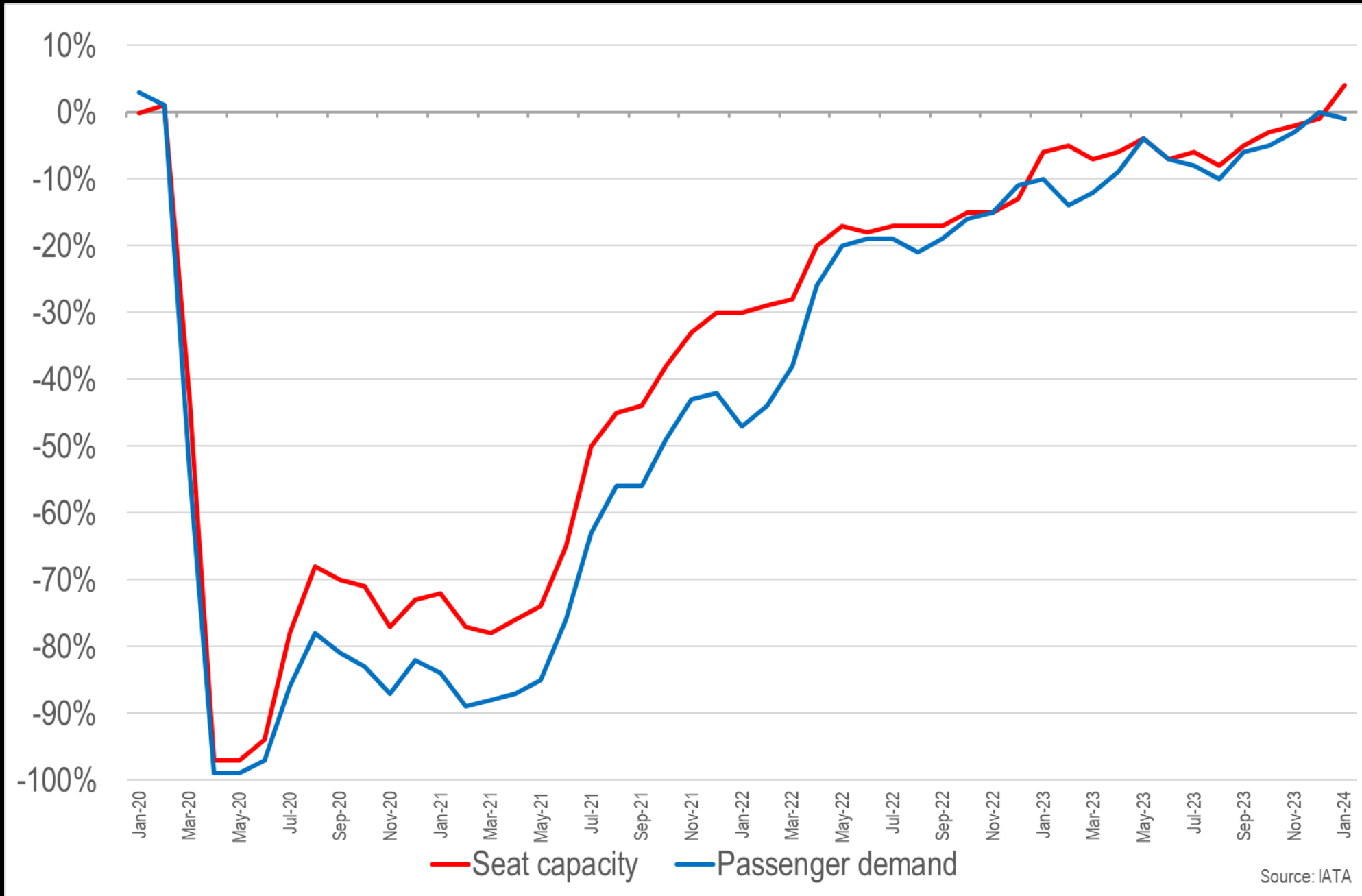
International arrivals in 2023 vs equivalent period of 2019



Source: ETC



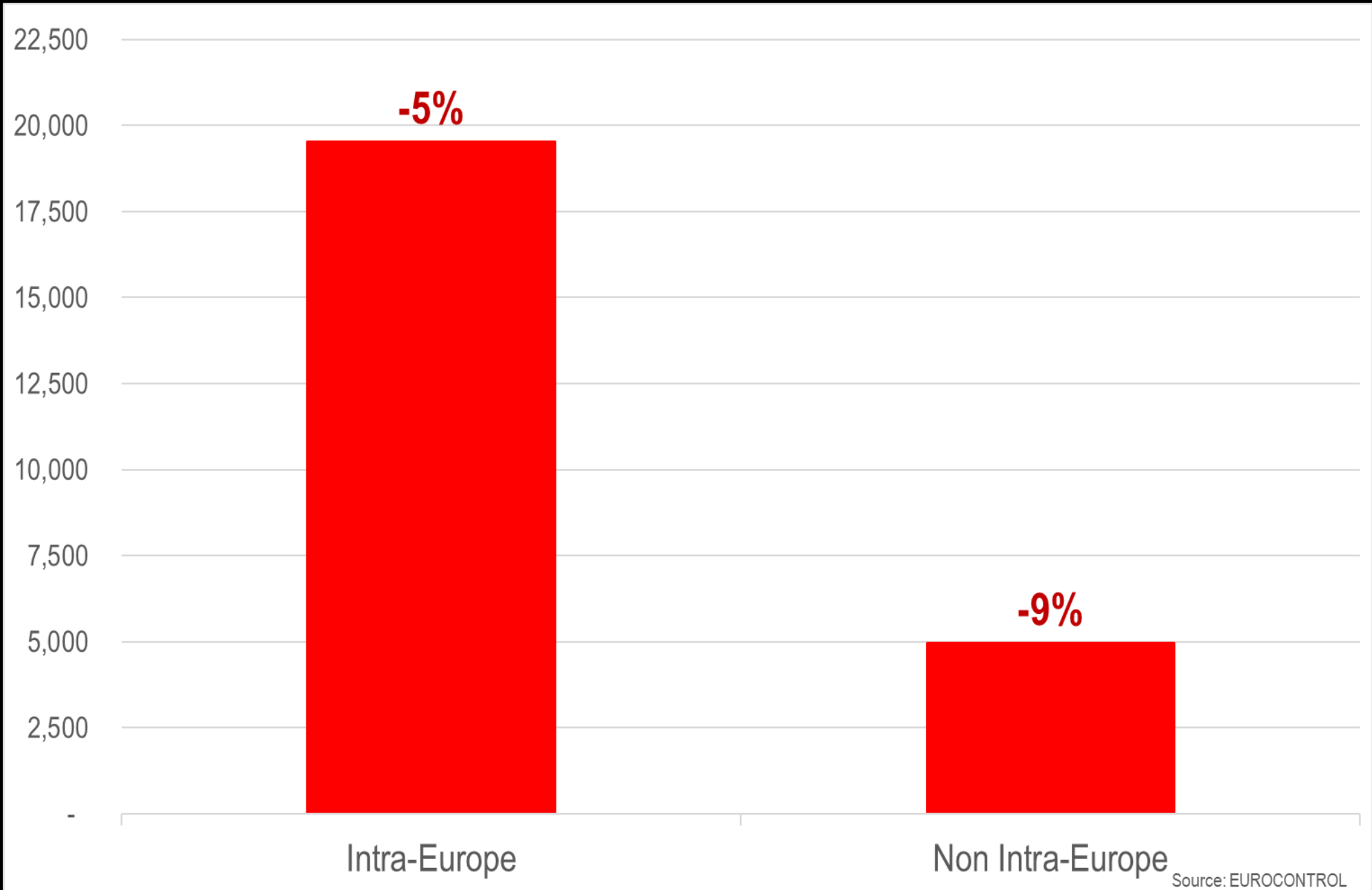
Europe international seat capacity and passenger demand vs same month in 2019



Source: IATA

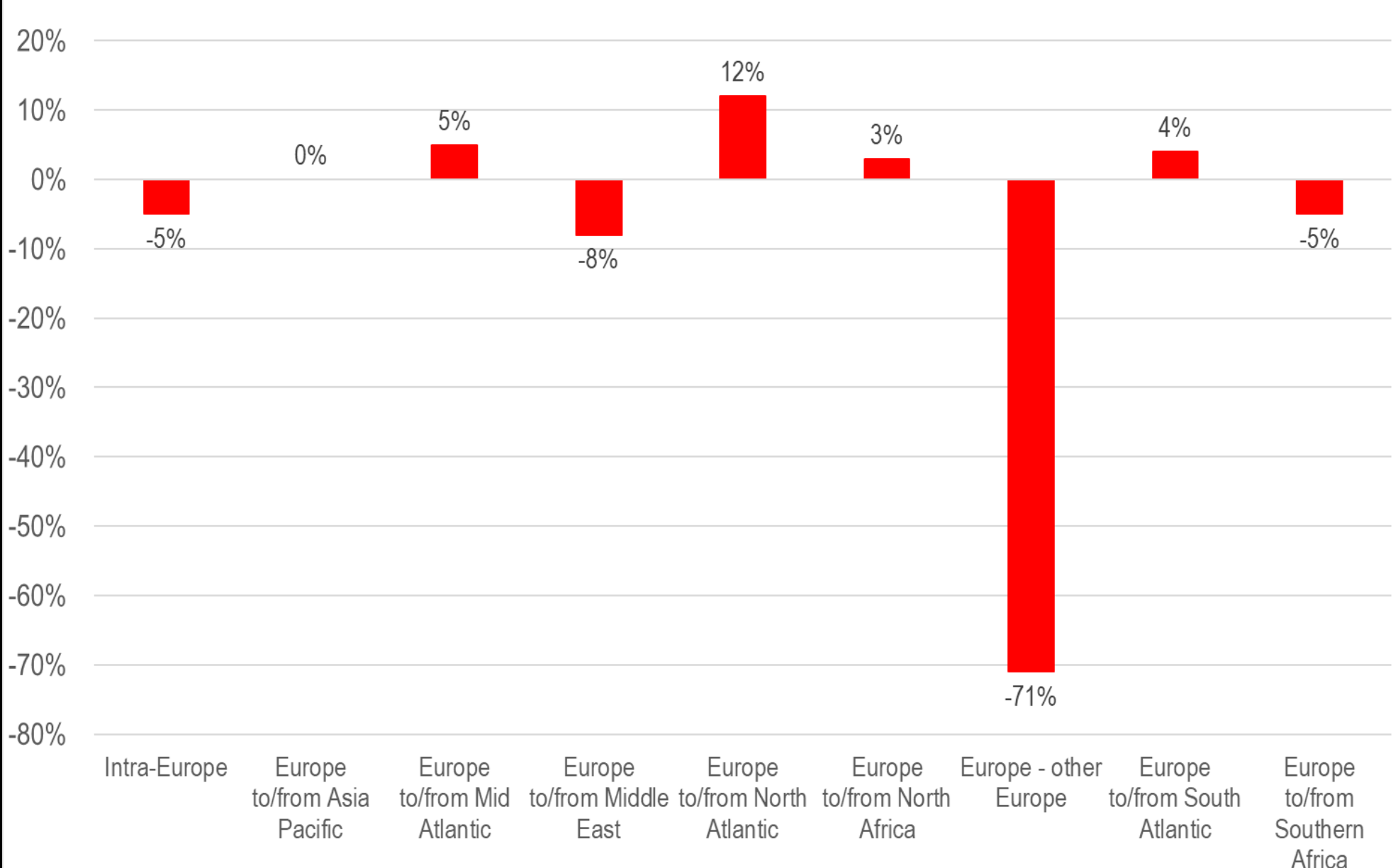


Average daily flights in Europe 11-17 March 2024 (and % change vs 2019)



Source: EUROCONTROL

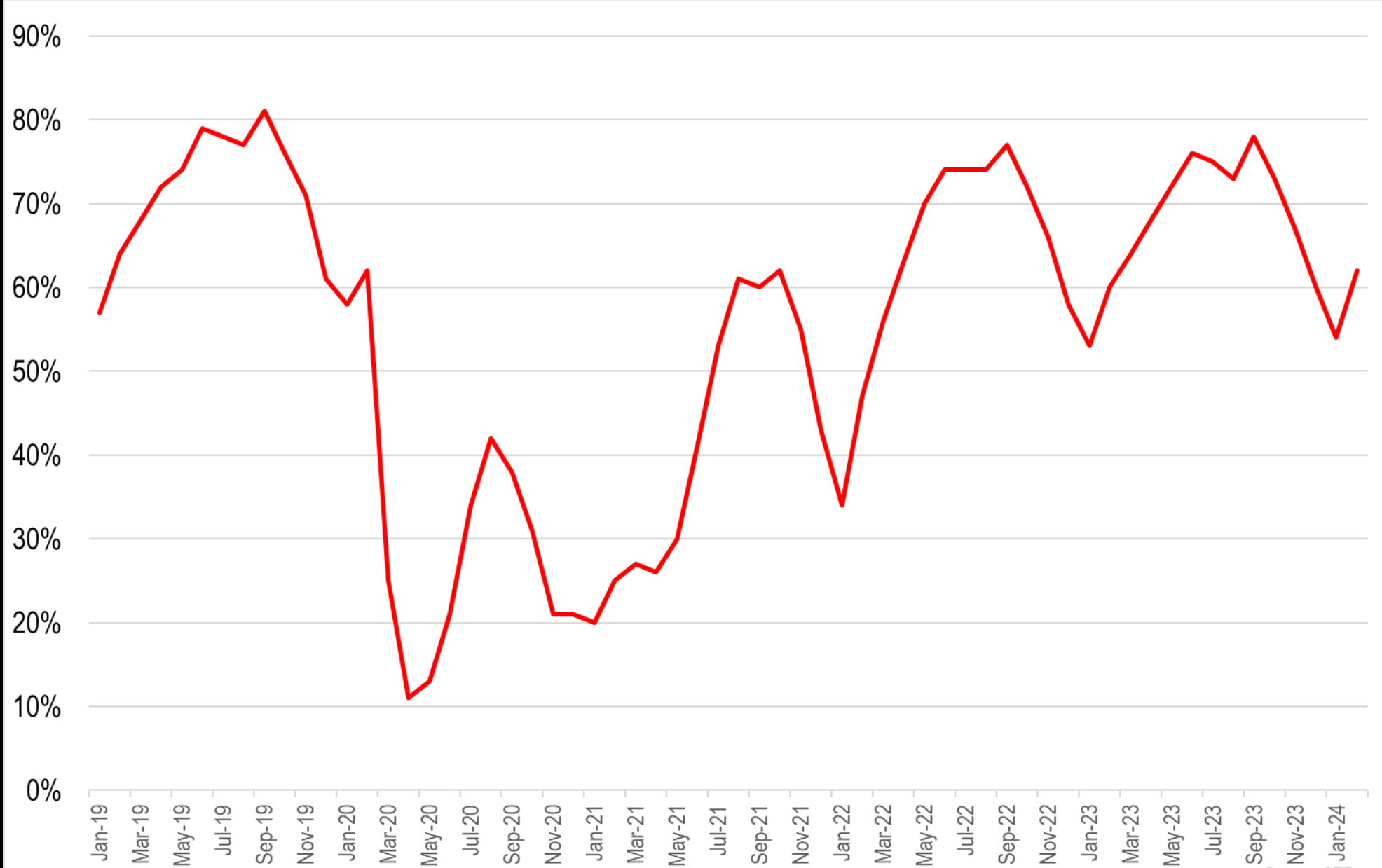
Average daily flights in Europe 11-17 March 2024 vs 2019



Source: EUROCONTROL



Hotel room occupancy in Europe since 2019

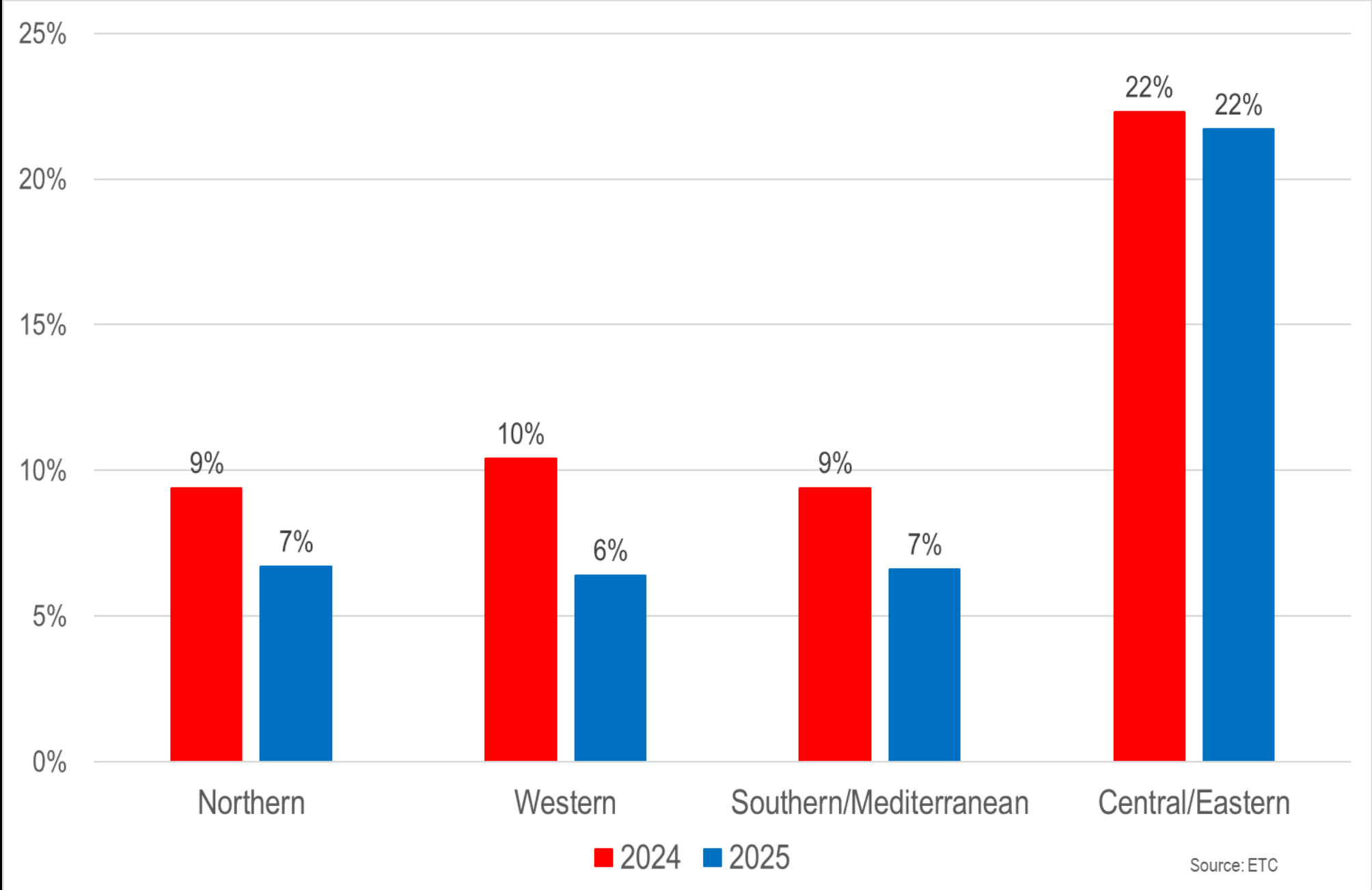


Source: STR

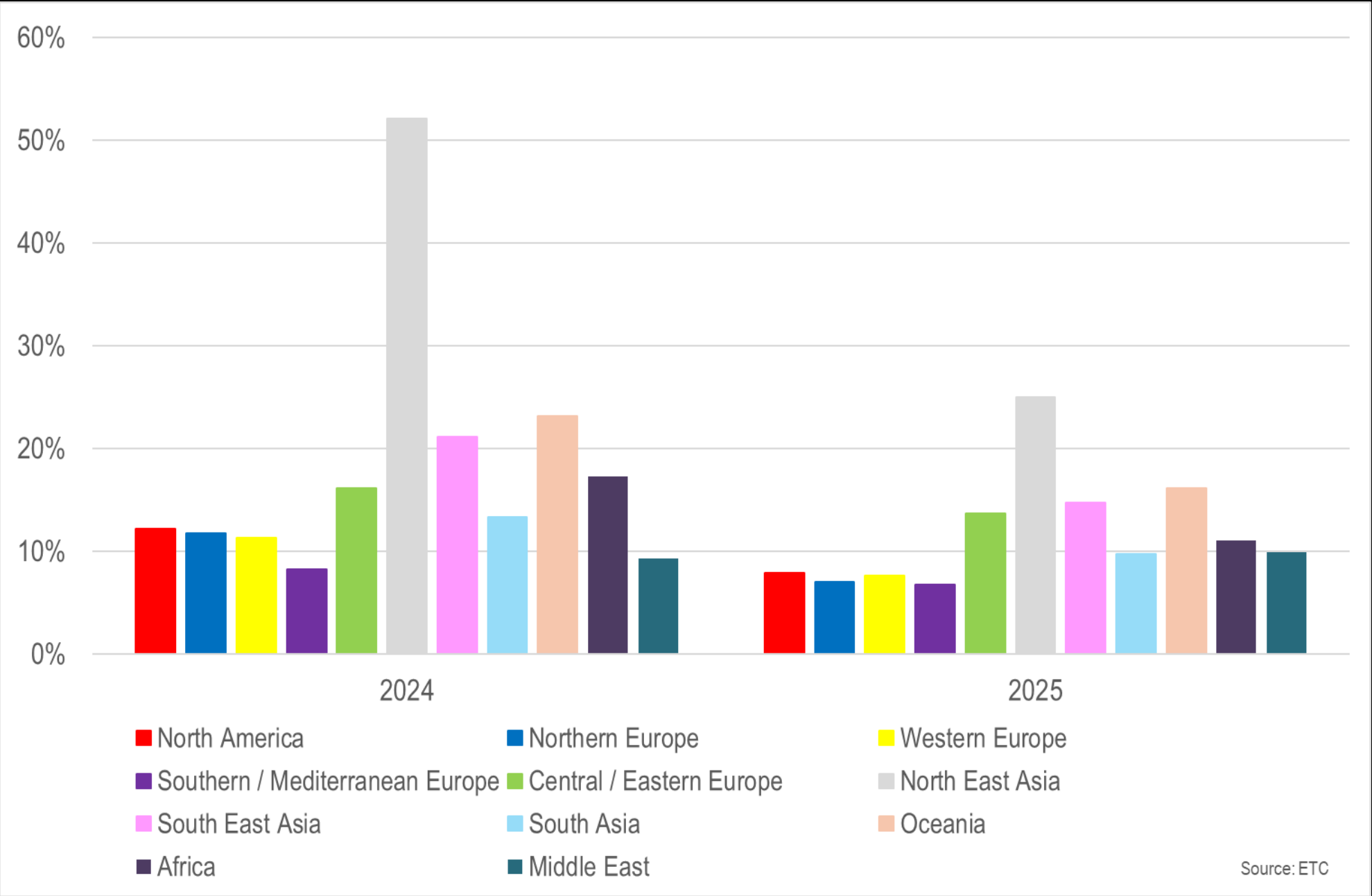
Mixed picture for major long-haul source markets

- Arrivals in Europe from China were estimated to be 67% below their tally of 2019 last year
- Tourism Economics forecast that in 2024 volumes from China will still be 39% lower than five years ago
- By contrast outbound travel from the US to Europe had fully recovered by 2023, compared with an average shortfall of 22% for all long-haul source markets
- In February 2024 US citizen air departures destined for Europe were 8.1% higher than in February 2019
- Continued growth is forecast from the US for the remainder of 2024 and into 2025

Forecast annual growth rate for inbound visits to Europe's regions



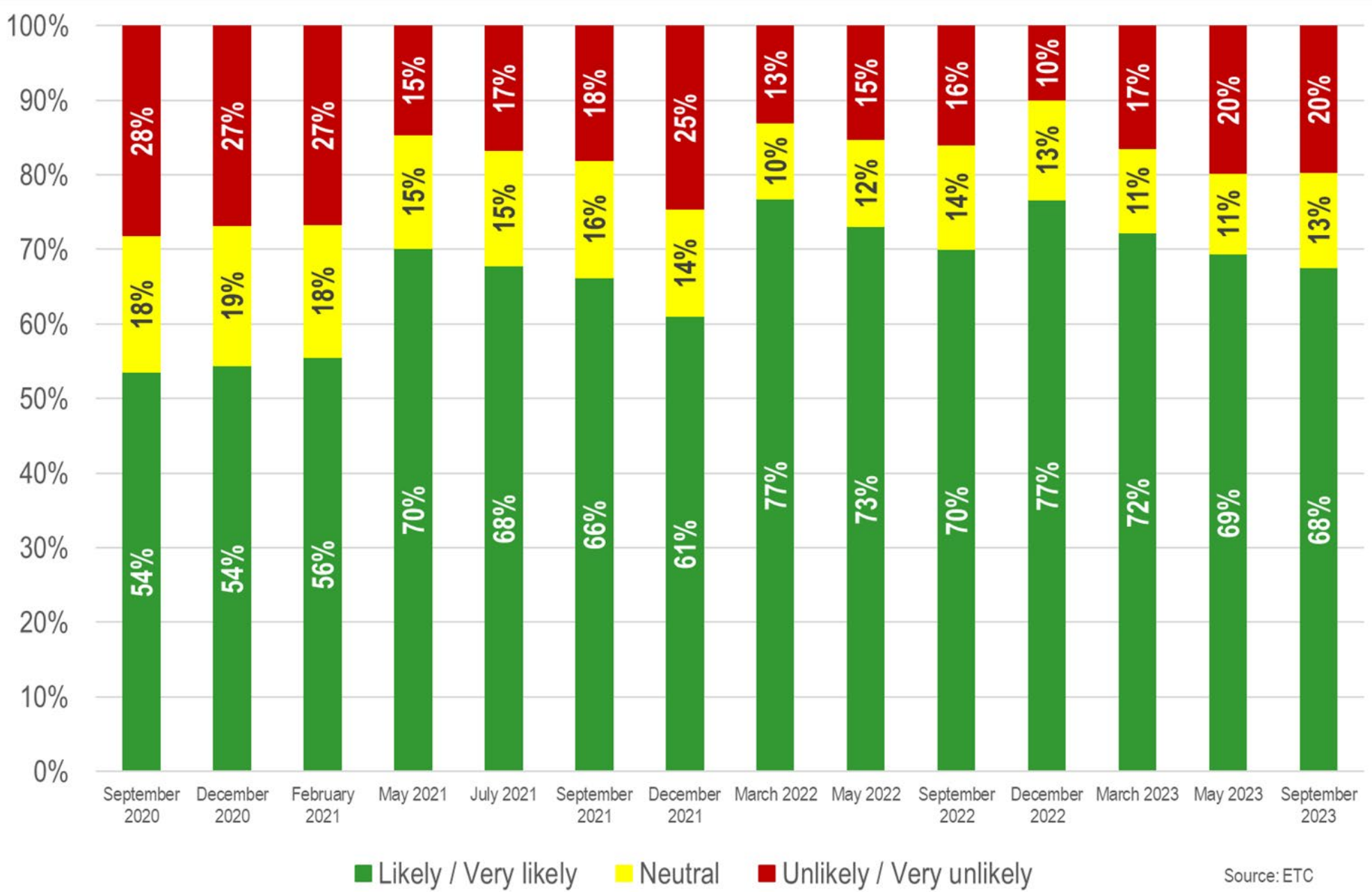
Forecast annual growth rate for outbound tourism



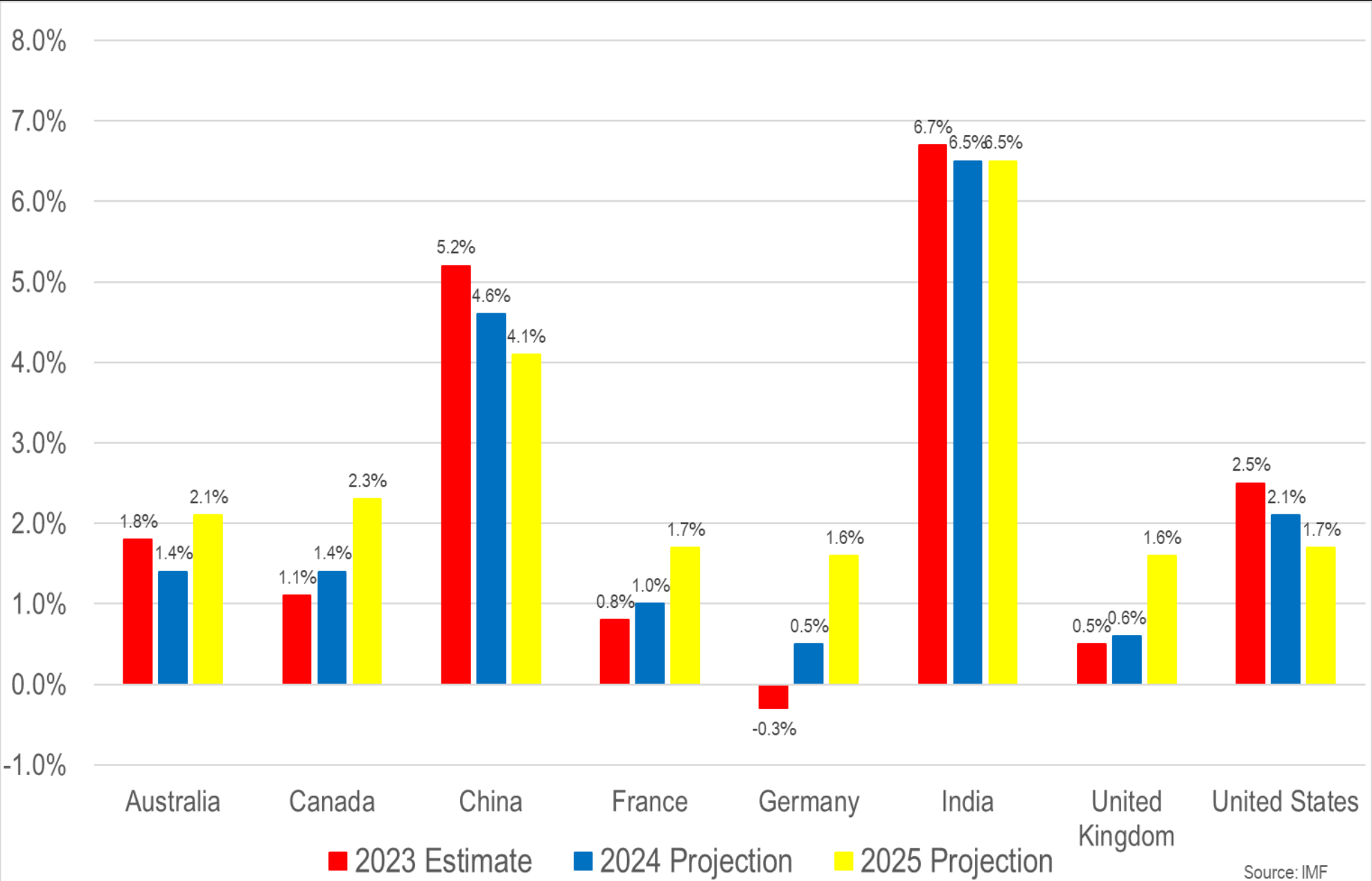
Source: ETC



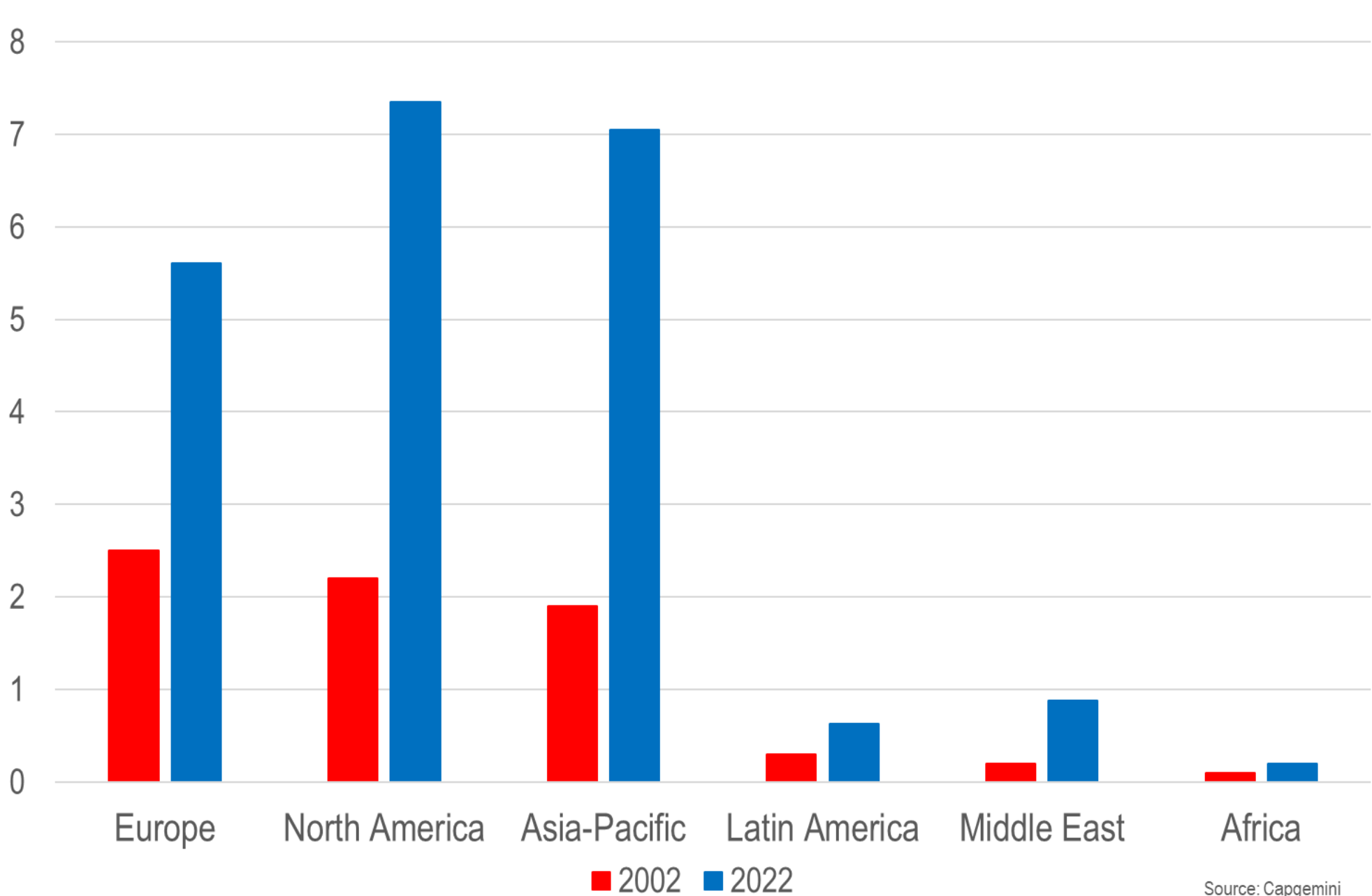
Most Europeans intending to travel internationally



Recent and forecast annual growth in real GDP



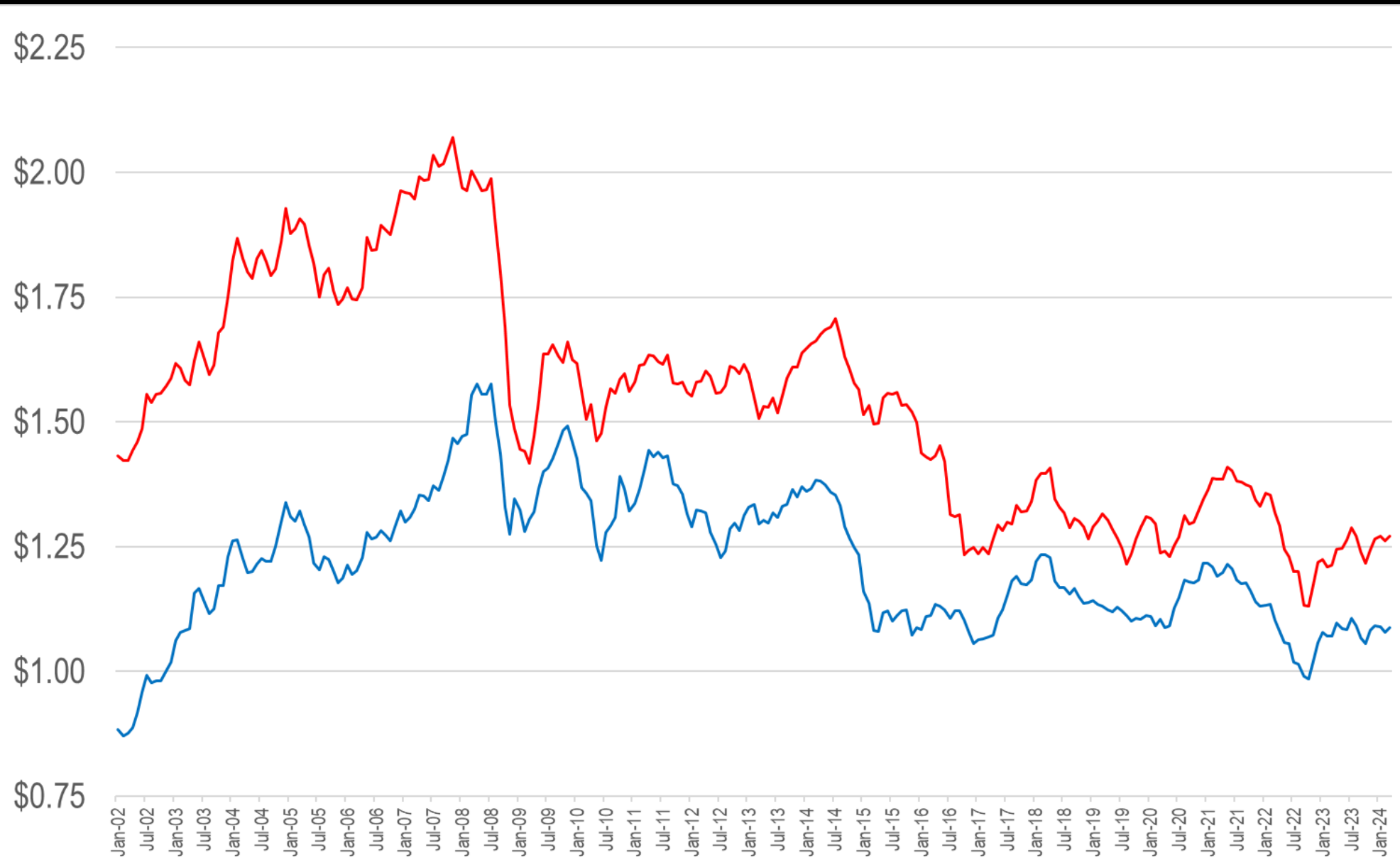
Not everyone is impacted by the cost-of-living crisis: High Net Worth Individuals (millions)



Source: Capgemini



How much Americans need to pay to buy £1 or €1

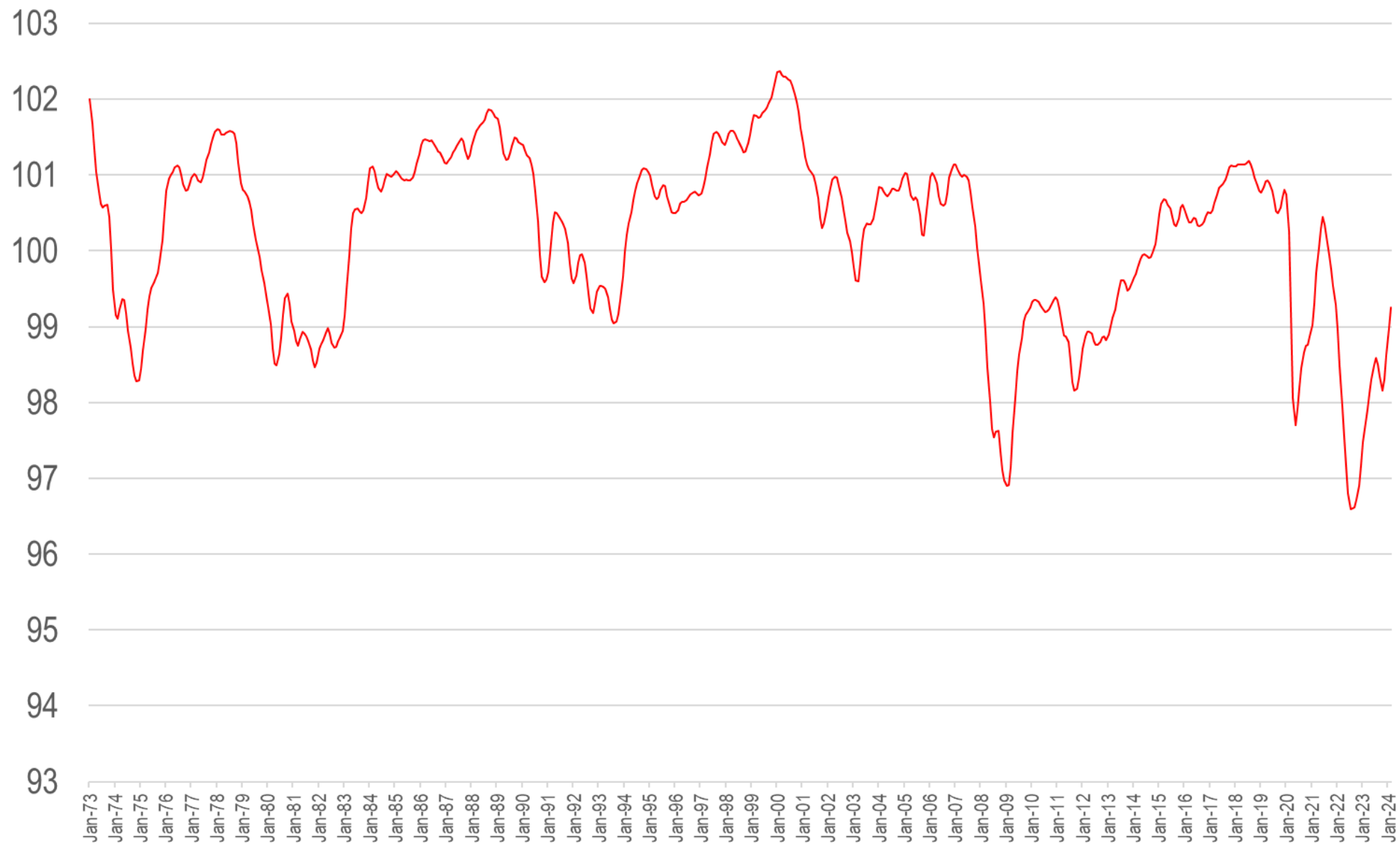


— Cost of £1 — Cost of €1

Source: Bank of England



OECD Consumer Confidence since 1974



Source: OECD

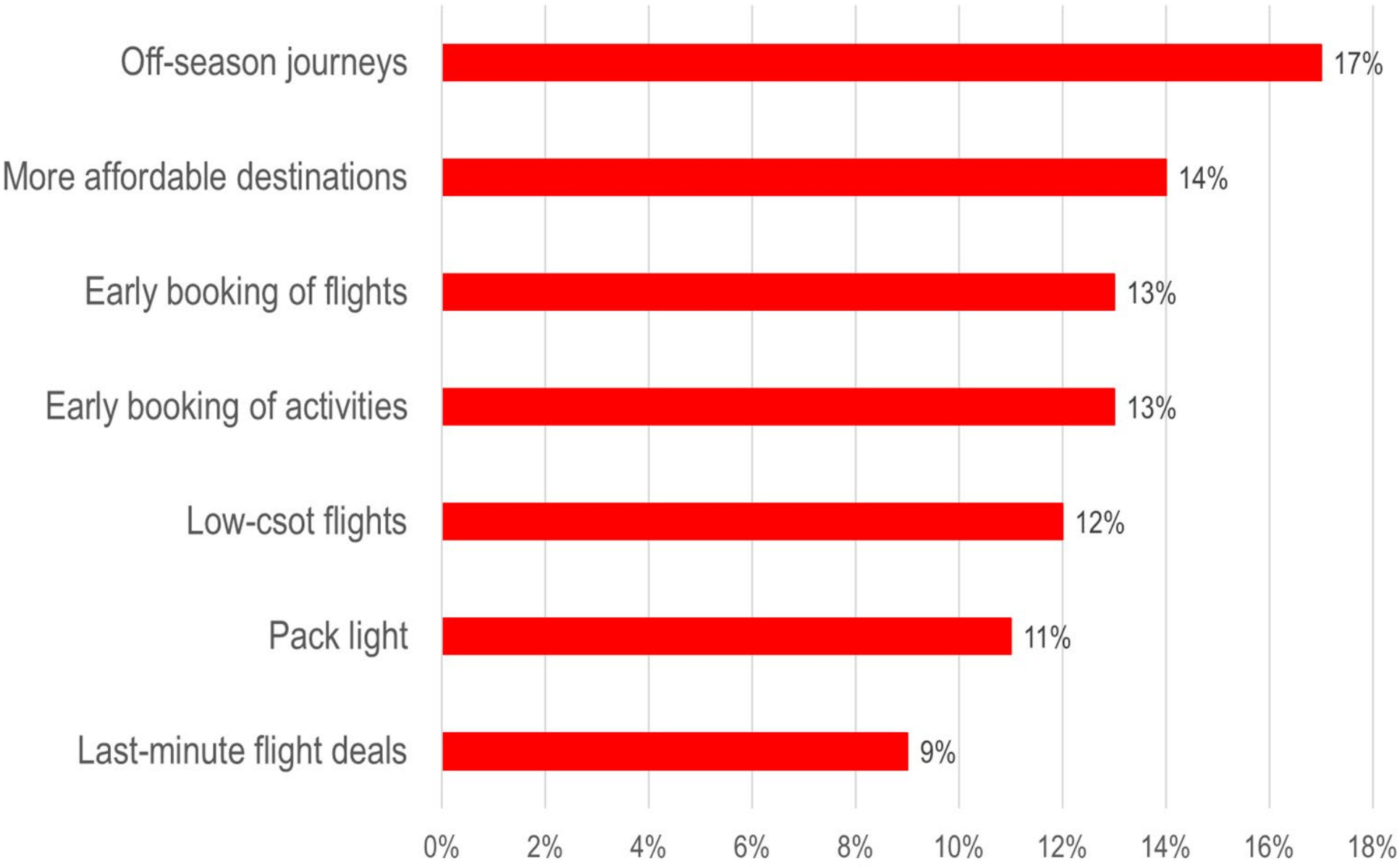


Europeans' travel concerns



Source: ETC

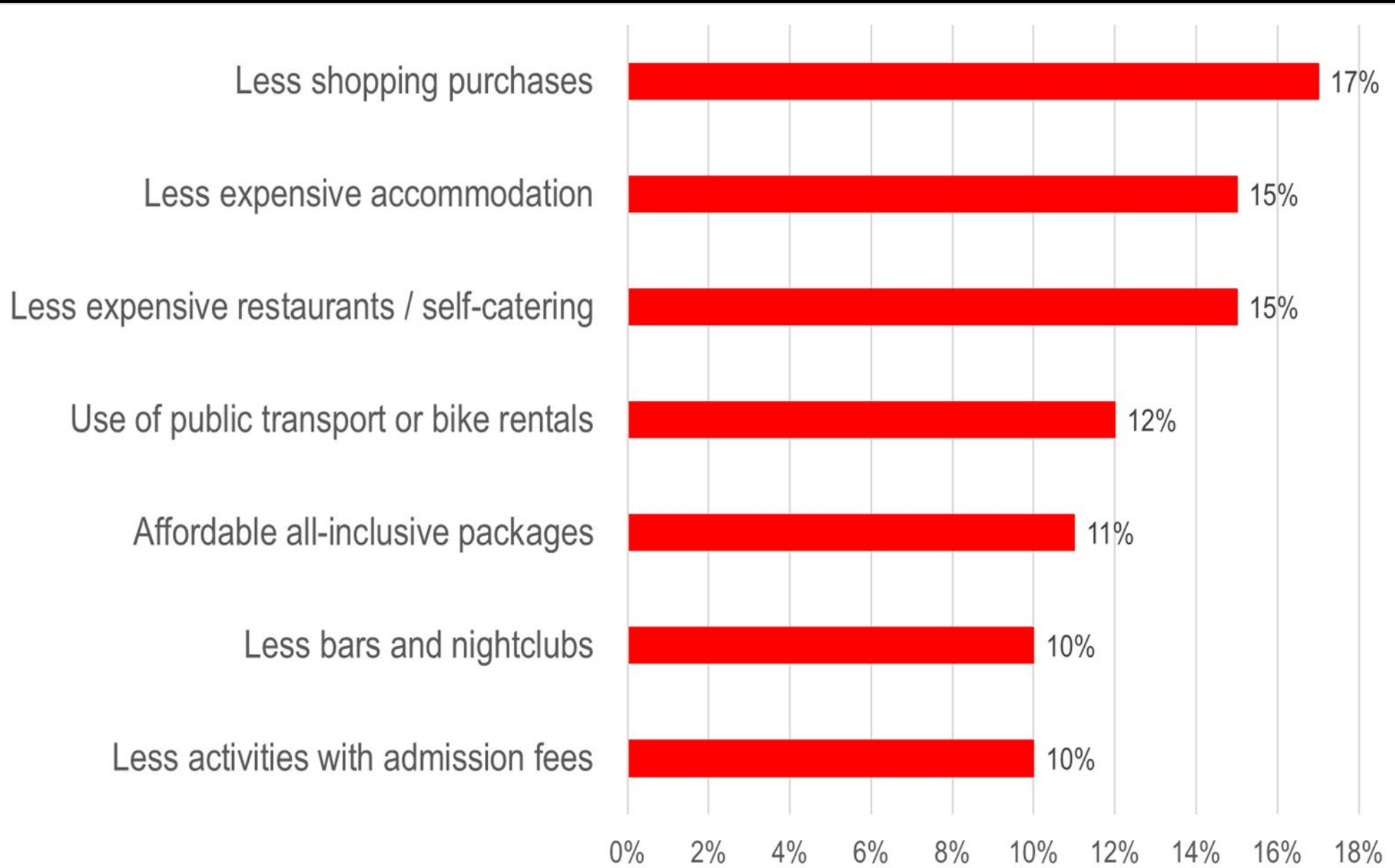
Travel behaviours Europeans adopting **before** their trip starts



Source: ETC

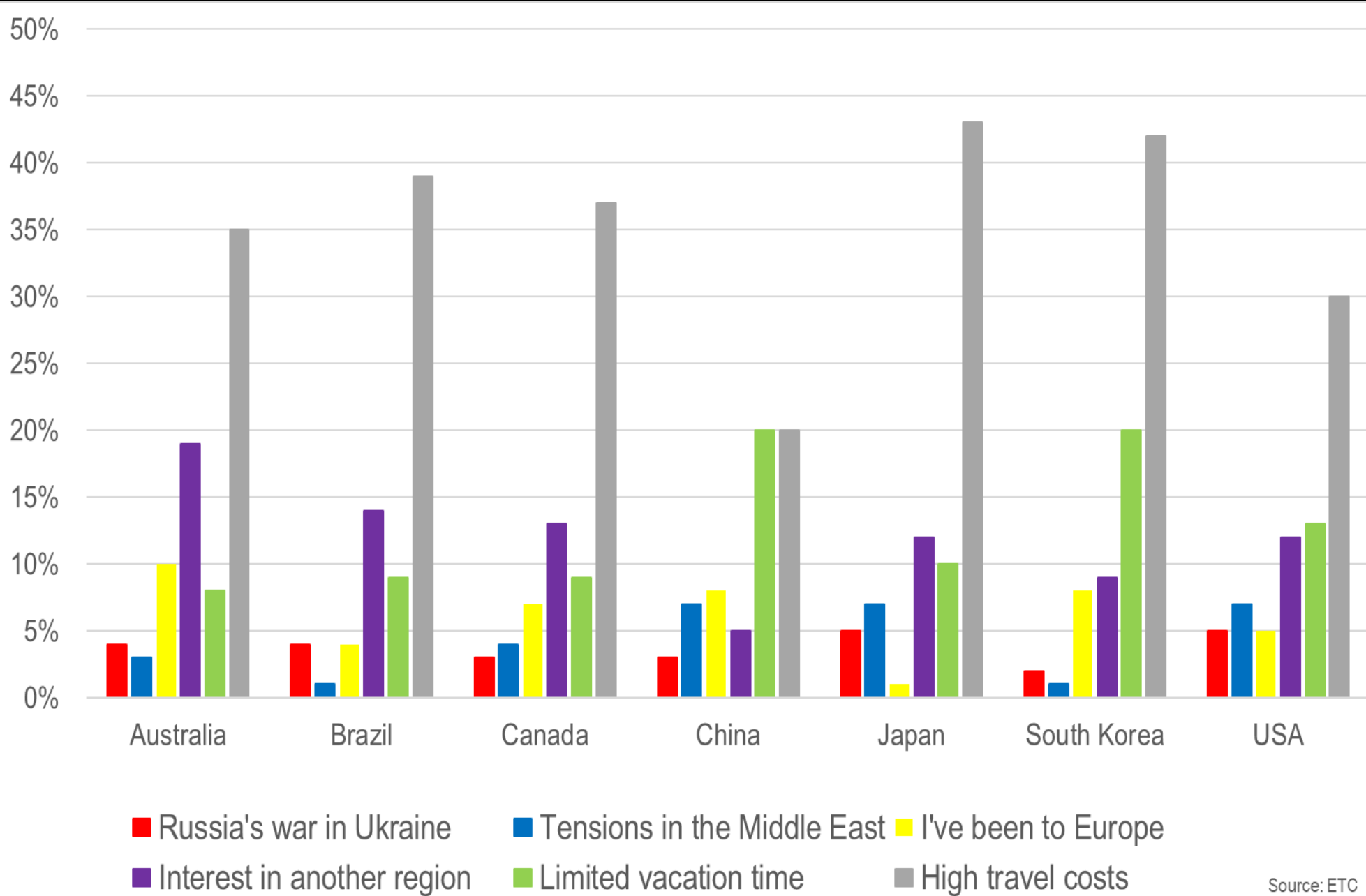


Travel behaviours Europeans adopting **after** arrival at their destination



Source: ETC

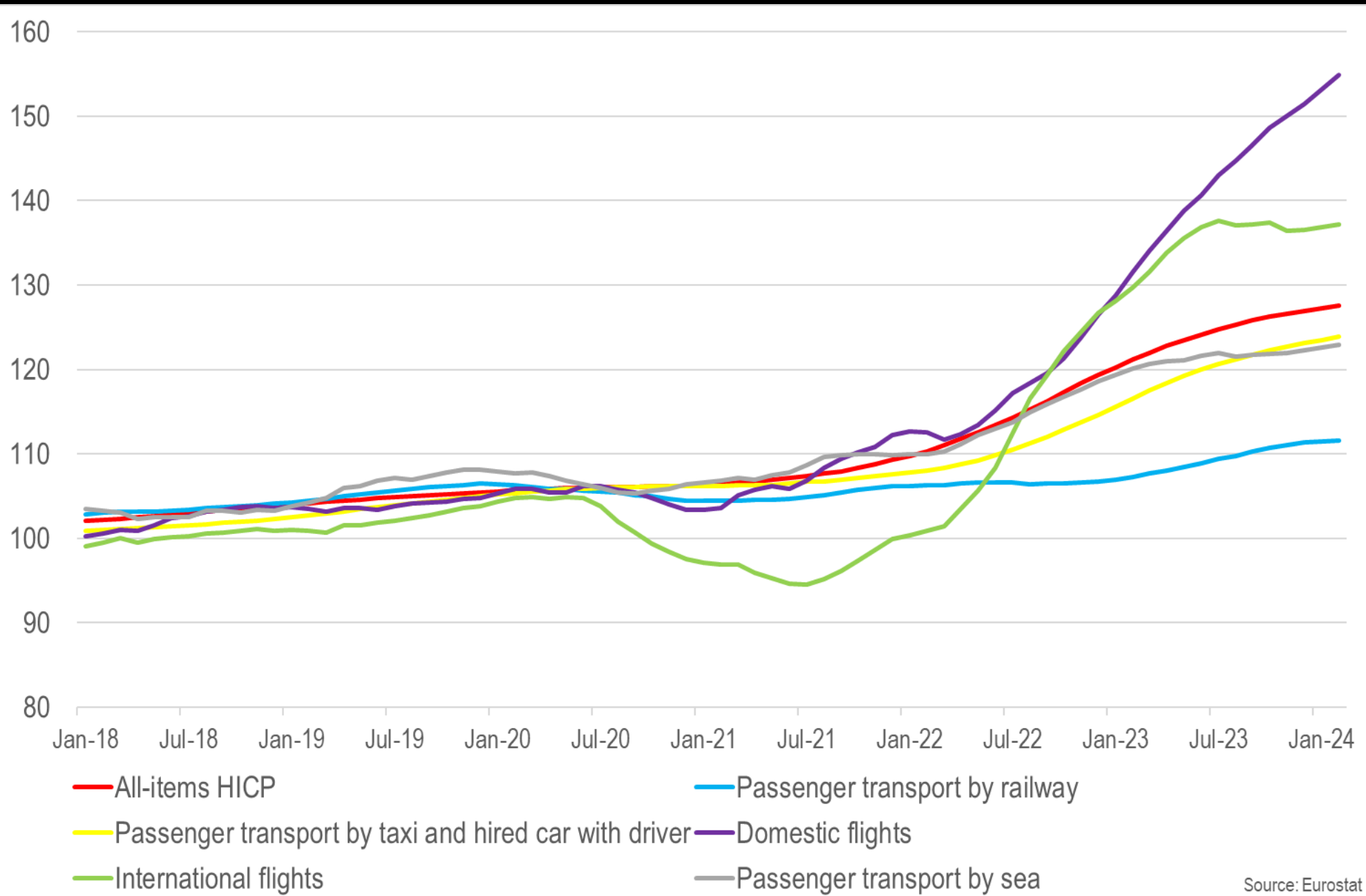
Barriers facing those planning a long-haul trip in 2024, but not to Europe



Source: ETC



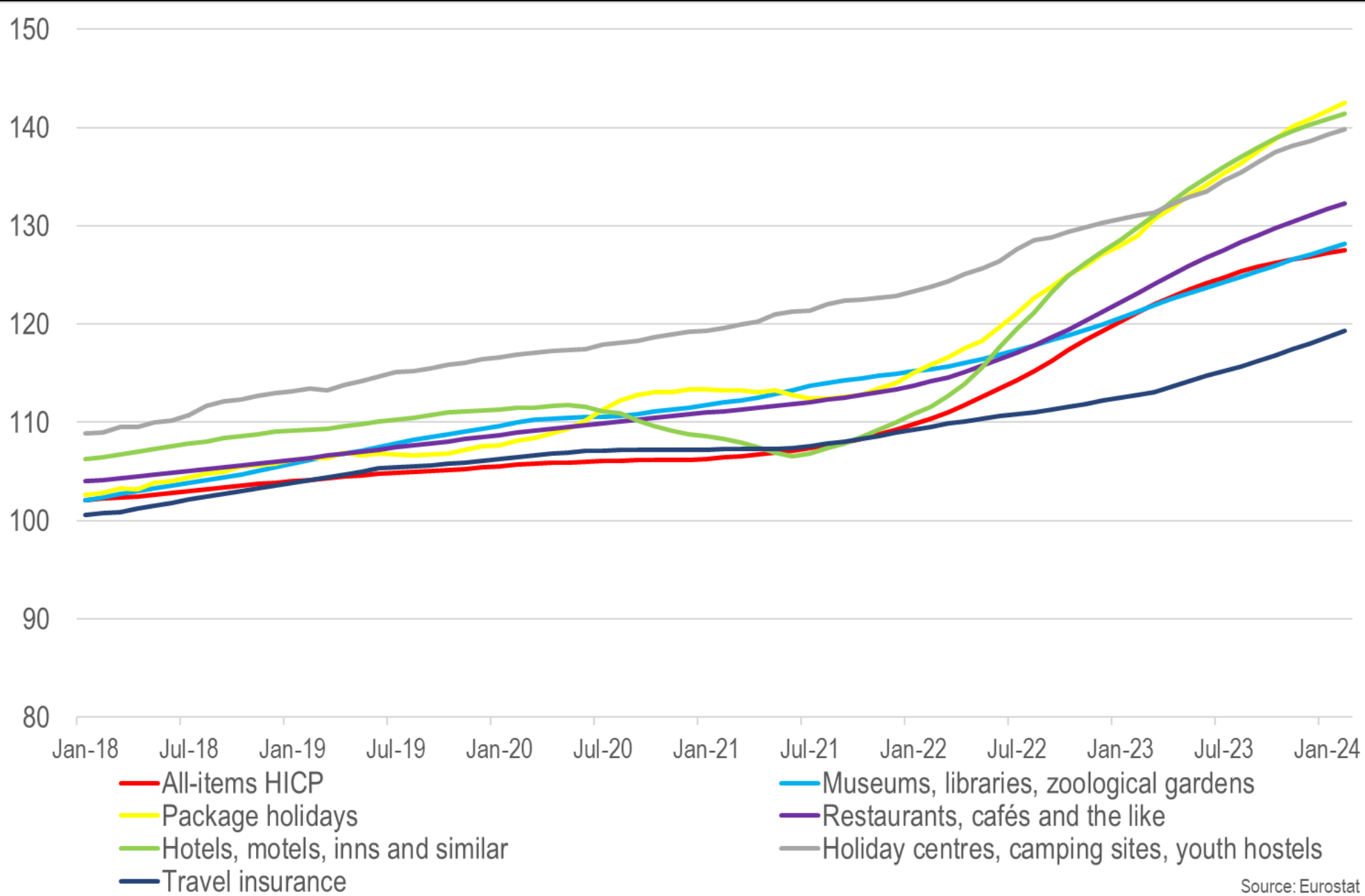
The rising cost of a holiday in Europe: **the journey** (2015=100)



Source: Eurostat



The rising cost of a holiday in Europe: **the destination** (2015=100)



Source: Eurostat

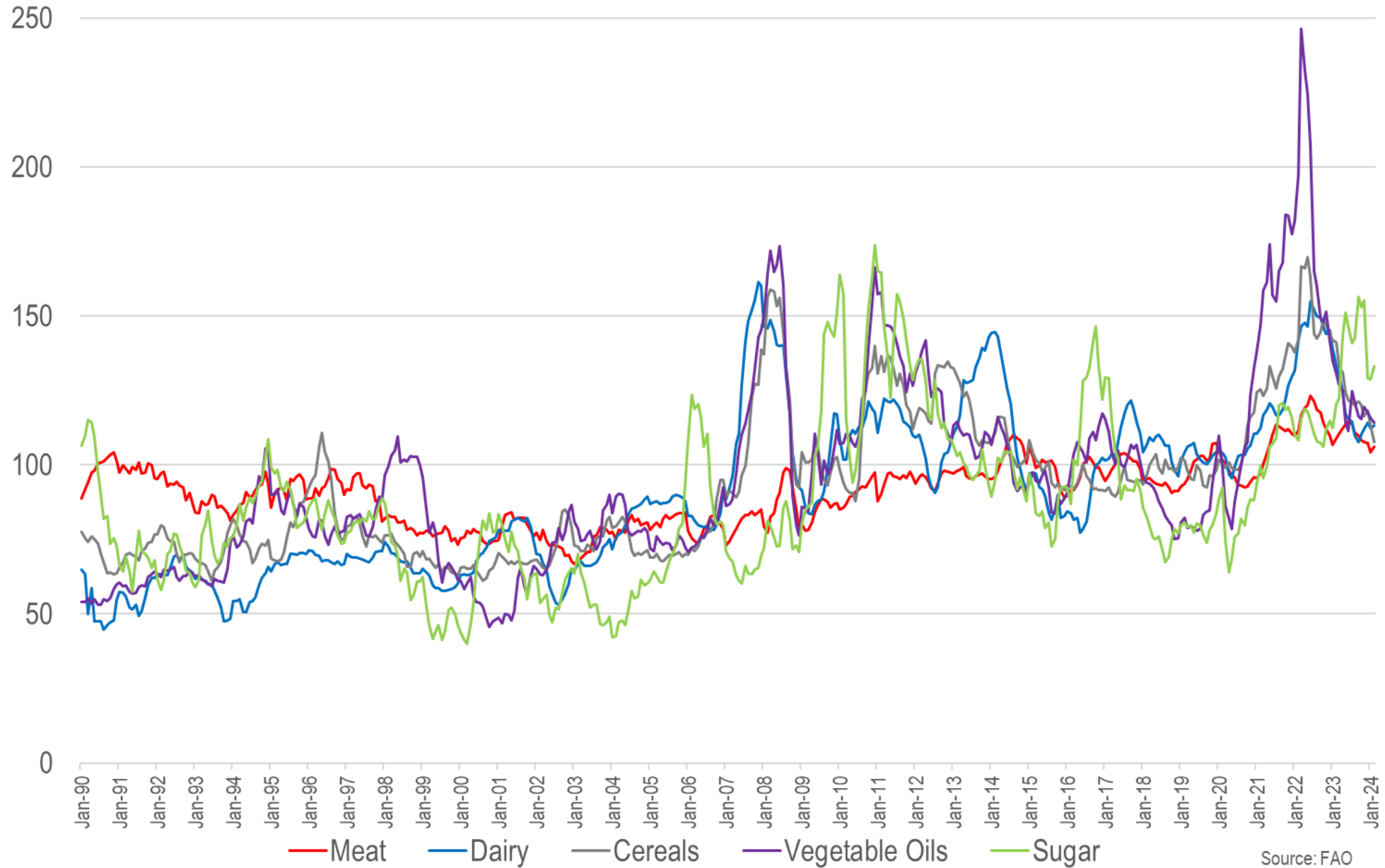
Europe Brent spot price since 1987 (unadjusted for inflation)



Source: EIA



Food commodity price indices since 1990 (adjusted for inflation)



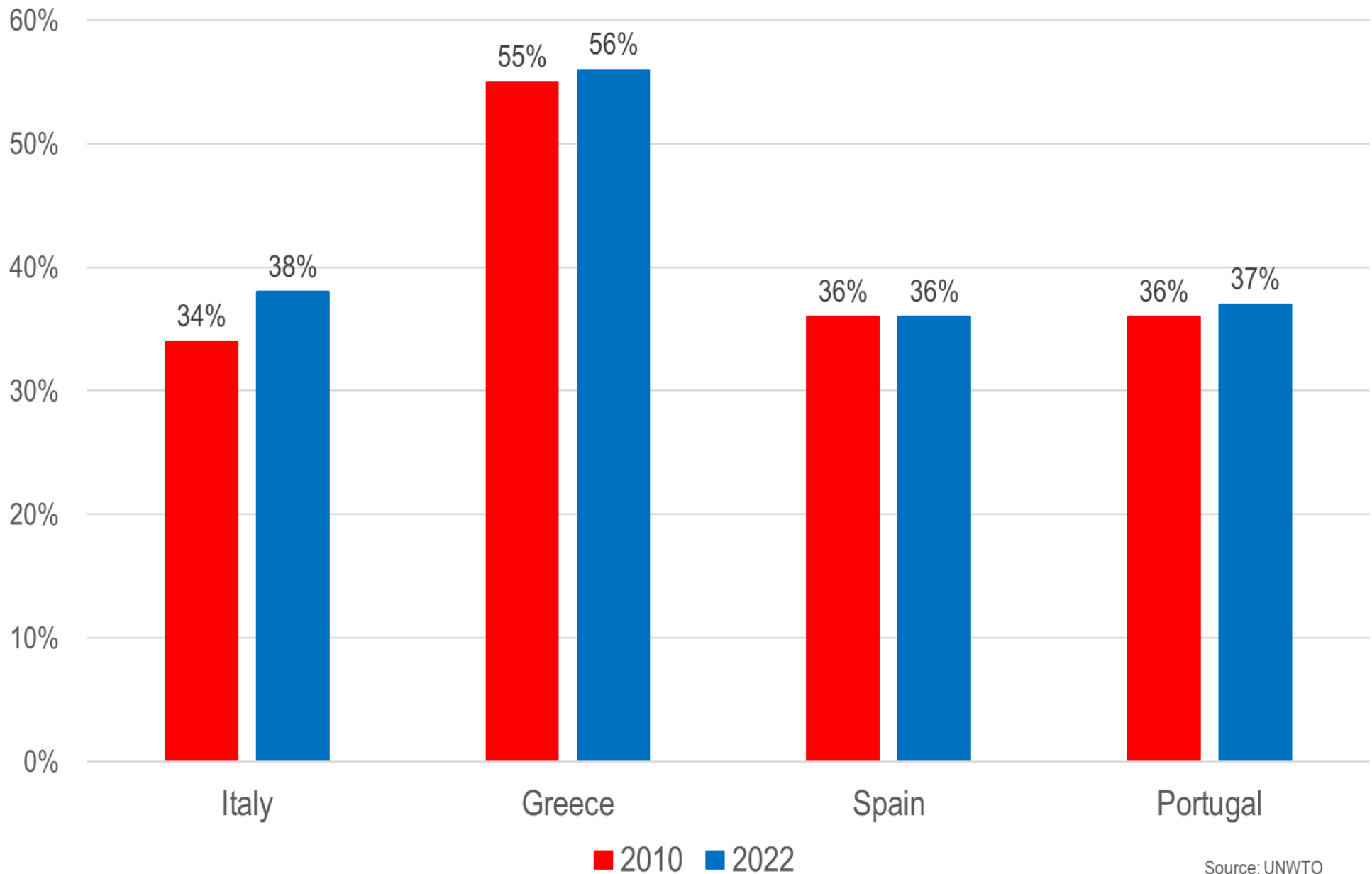
Source: FAO



Climate change

- Recent ETC research suggests travellers are most concerned about climate change if they think it will hinder their planned activities or put their safety at risk
- 1.2% of written traveller reviews in Europe in 2023 mentioned sustainability, up from 0.3% in 2019
- It is possible that there will be a shift in where and when people travel, perhaps choosing northern rather than southern European destinations, and opting for autumn or spring rather than summer
- Activities undertaken may evolve too, for example visiting mountainous regions to hike in summer rather than ski in winter
- Impacts from events related to climate change may negatively impact the reputation of a destination, but such impacts are often short-lived

Seasonality: July-September share of annual arrivals



Source: UNWTO



Border formalities (1)

- The EU's Entry Exit Scheme (EES) will be an automated IT system for registering third country (non-EU/non-EFTA) nationals each time they visit the Schengen Area for a short stay (max 90 in 180 days), regardless of whether visa-exempt and visa-requiring
- The system will register the person's name, type of the travel document, biometric data (fingerprints if aged 12+ and captured facial image) and the date and place of entry / exit
- Biometric data will be collected at the port of entry (an app may be used to submit facial image in advance depending on implementation by the member state of entry)
- The scheme is currently planned to launch on 6 October 2024
- From mid 2025 (there will be a grace period) the European Travel Information and Authorisation System (ETIAS) will start to apply to short-stay visa-exempt nationals entering the Schengen Area and Cyprus

Border formalities (2)

- The ETIAS application form will ask travellers to provide personal information, such as name, address, passport details and current occupation, it will also contain questions about past travel to conflict zones or criminal convictions and travellers will be required to indicate their travel plans
- The fee will be €7 for those aged 18-70, with those aged under 18 or over 70 not paying a fee but still needing to apply
- An ETIAS will be valid for three years or until the expiration of the person's passport
- The UK's equivalent, ETA, is currently being implemented and costs £10, is valid for two years, and is required for those who are merely transiting airside as well as those formally entering the UK
- Further information on EES, ETIAS and ETA at:

<https://www.etoa.org/operating-in-europe/visas-and-borders/>



Events that may shape tourism in 2024

- The global geopolitical environment remains a significant headwind
- Weather events are becoming more of a challenge, and not just floods and wildfires
- Prevailing weather conditions accounted for 11% of total delays to air travel in Europe in 2012 but 30% last year with sizeable hail and intense rainfall increasingly common
- The Olympic and Paralympic Games in Paris during July and August may displace some inbound traffic if securing hotel rooms and / or accessing key tourist sites proves challenging
- The Men's Euros in Germany during June and July is less likely to impact inbound long-haul travel, but may influence intra-European trips

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Tourism's acceptance and integration in destination strategy

- Rachel McCaffery, Sustainability Lead, Visit England
- Alberto Bosque, Head of Marketing Division, Castilla y León Tourist Board
- Tim Fairhurst, Director General, ETOA

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Managing a Successful Visitor Economy

- Michael Huijser, General Director, National Maritime Museum Amsterdam
- Ramon Van der Storm, Managing Director, Blue Boat Company

AMSTERDAM



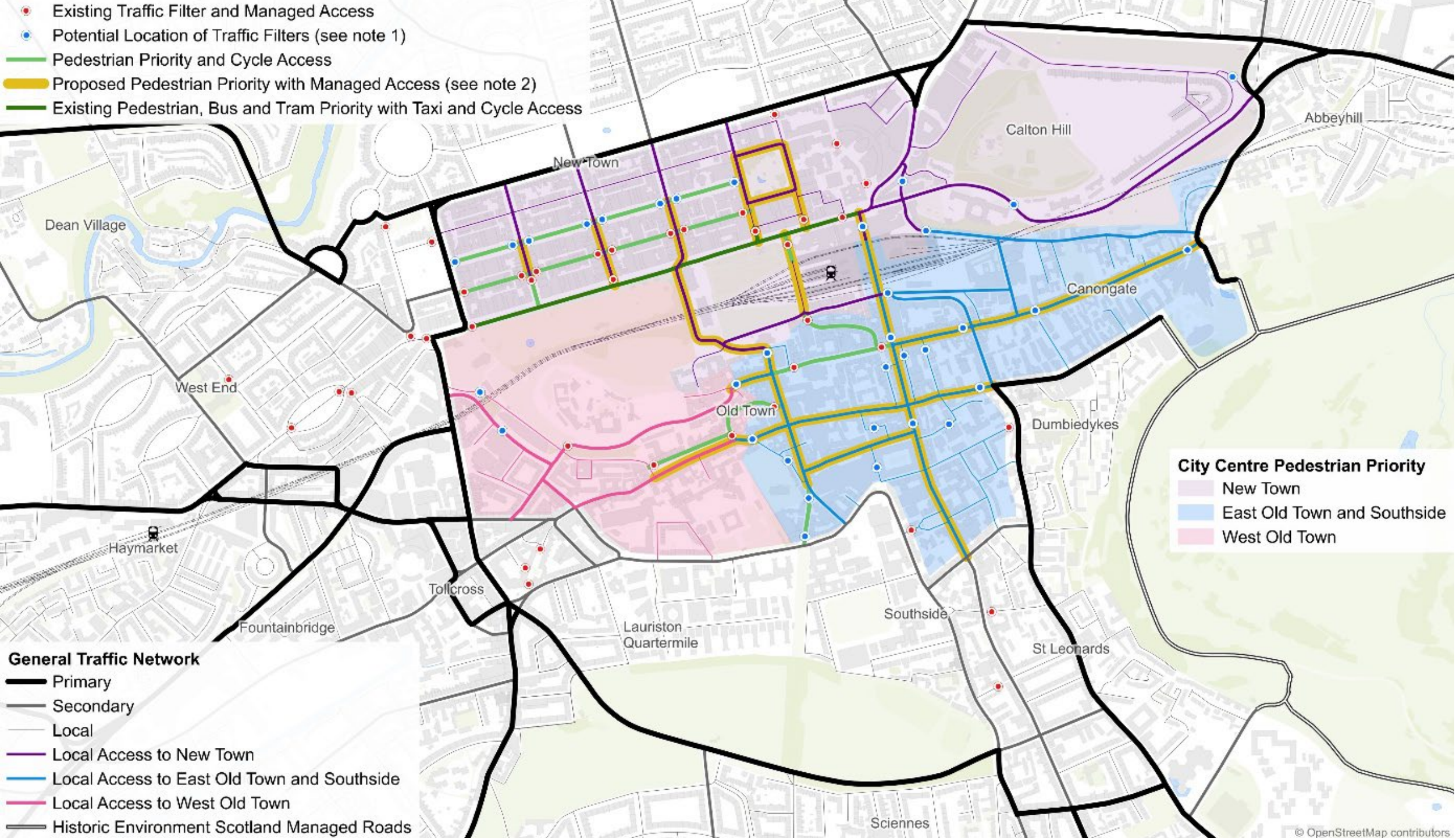
www.amsterdam.nl/en/traffic-transport/coaches-tour-buses/

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Managing a Successful Visitor Economy

- Daisy Narayanan, Head of Placemaking and Mobility, Edinburgh Council
- Cllr Scott Arthur, Edinburgh Council



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Managing a Successful Visitor Economy

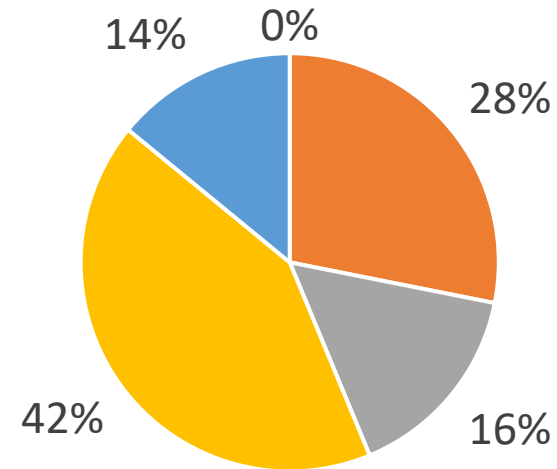
- Petra Stušek, President, City Destinations Alliance

ETOA PULSE CHECK today



To what extent do you agree or disagree with this statement?

I feel tourism is well understood and supported by local government in European destinations.



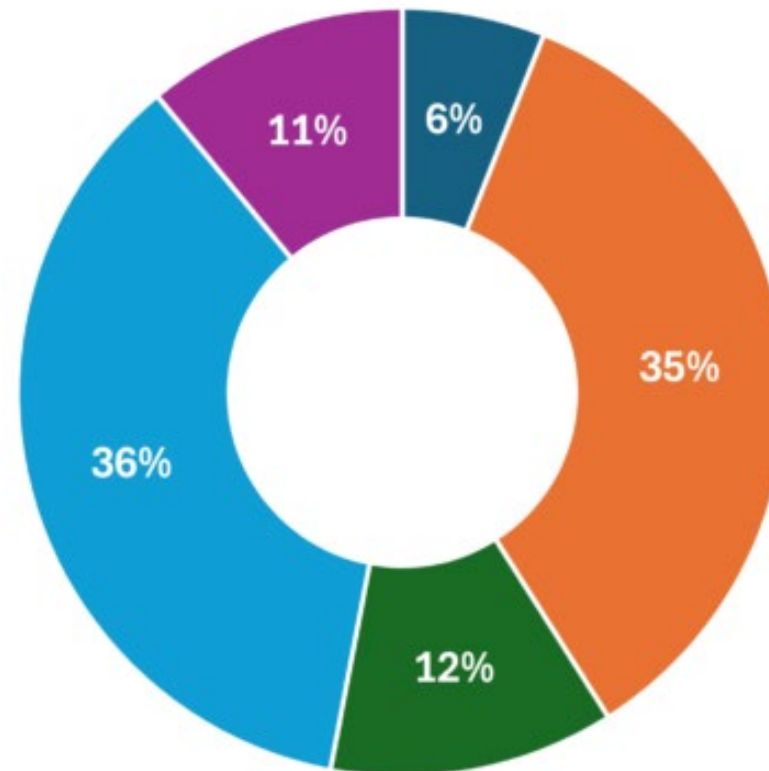
- Strongly Agree
- Somewhat Agree
- Neither Agree or Disagree
- Somewhat Disagree
- Strongly Disagree

ETOA PULSE CHECK



To what extent do you agree or disagree with this statement?

I feel tourism is well understood and supported by local government in European destinations.



- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

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B2B EVENTS 2024-2025



24 May 2024
Shanghai



10 Sep 2024
Online



25 Sep 2024
Online



31 Oct - 1 Nov 2024
London



24 Jan 2025
London



17-18 Feb 2025
Copenhagen



27 Feb 2025
Online



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EXHIBIT WITH ETOA



London
5-7 November 2024



Mumbai
30-31 January 2025



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Berlin
4-6 March 2025

Contact: Arran Wiltshire: awiltshire@etoa.org or events@etoa.org



ETOA Spring Party

Live music, drinks and food

17:00-21:00

Hard Rock Café
The Rock Room
150 Old Park Lane, W1K 1QZ

Spaces still available!

