



ETOA

BETTER TOURISM IN EUROPE

DESTINATIONS EXCHANGE EUROPE 2025

#DEE25

Network: IHG ONE REWARDS
Select Option: Access Code
Access code: ONEREWARDS

Today



12:00 Emerging Trends in Travel Demand | Insights into Europe's Visitors and Preferences

12:50 An update from ETOA and City Destinations Alliance (CityDNA)

13:00 *Networking Lunch*

14:00 Destination Good Practice | Data practices, community engagement, and innovation

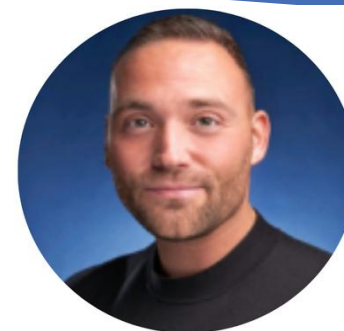
14.45 *Break*

15.15 Destination Panel | Positioning, Challenges, Diverse Markets and Collaboration

16:15 *Break*

16:30 Operators Panel Product Development | Good practice - scalable solutions and products

17.30 - *Networking Drinks*



Emerging Trends in Travel Demand | Insights into Europe's Visitors and Their Evolving Preferences

- Rachel Read, Director of Insight & Business Improvement, ETOA
- David Edwards, Tourism Insight Expert, ETOA
- Ramon Pons, Director of Partnerships, Arival
- Adele Youngs, Founder of Live Travel and Tours and ETOA President
- Bjorn van Gelder, Senior Account Manager, Benelux & Nordics, Get Your Guide



Emerging Trends in Travel Demand | Inbound Domestic Trends & Insights

- David Edwards, Tourism Insight Expert, ETOA

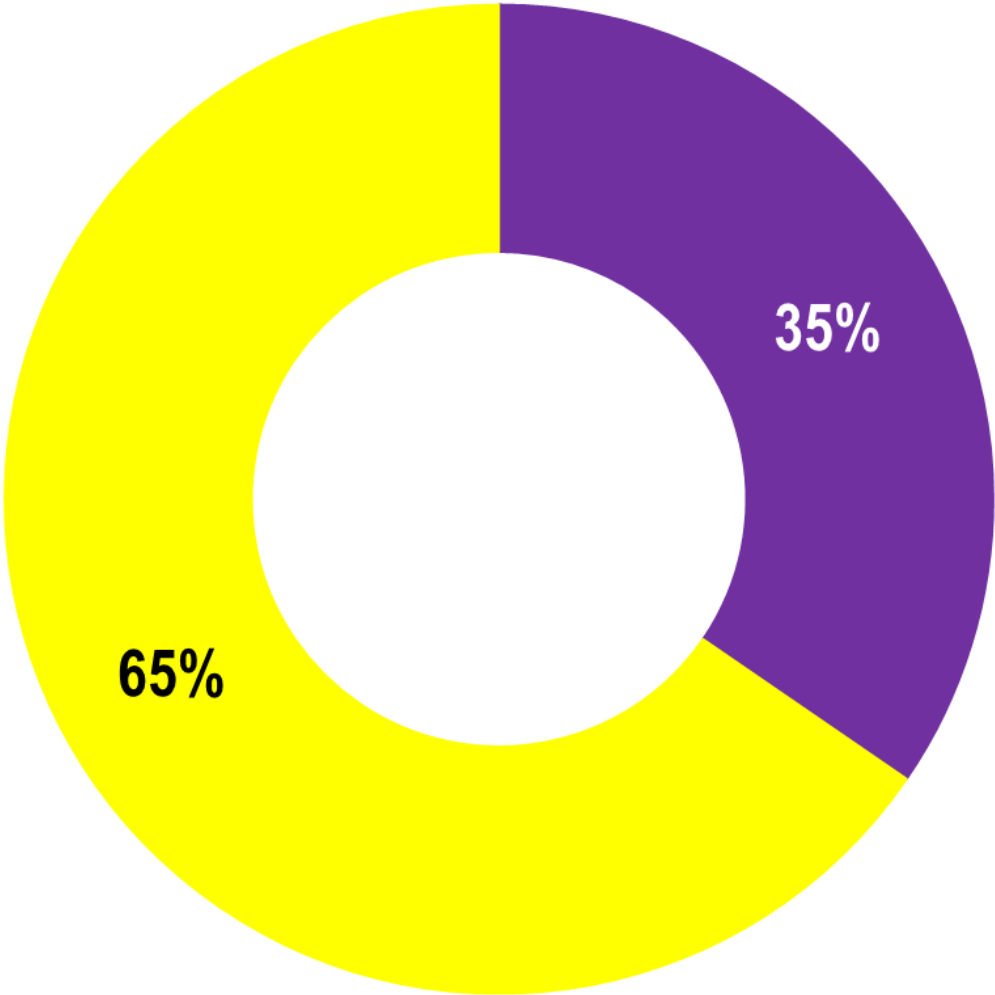
ETOA

Inbound and domestic trends and insights

June 2025



Visitor spending in Europe (2024 estimates)

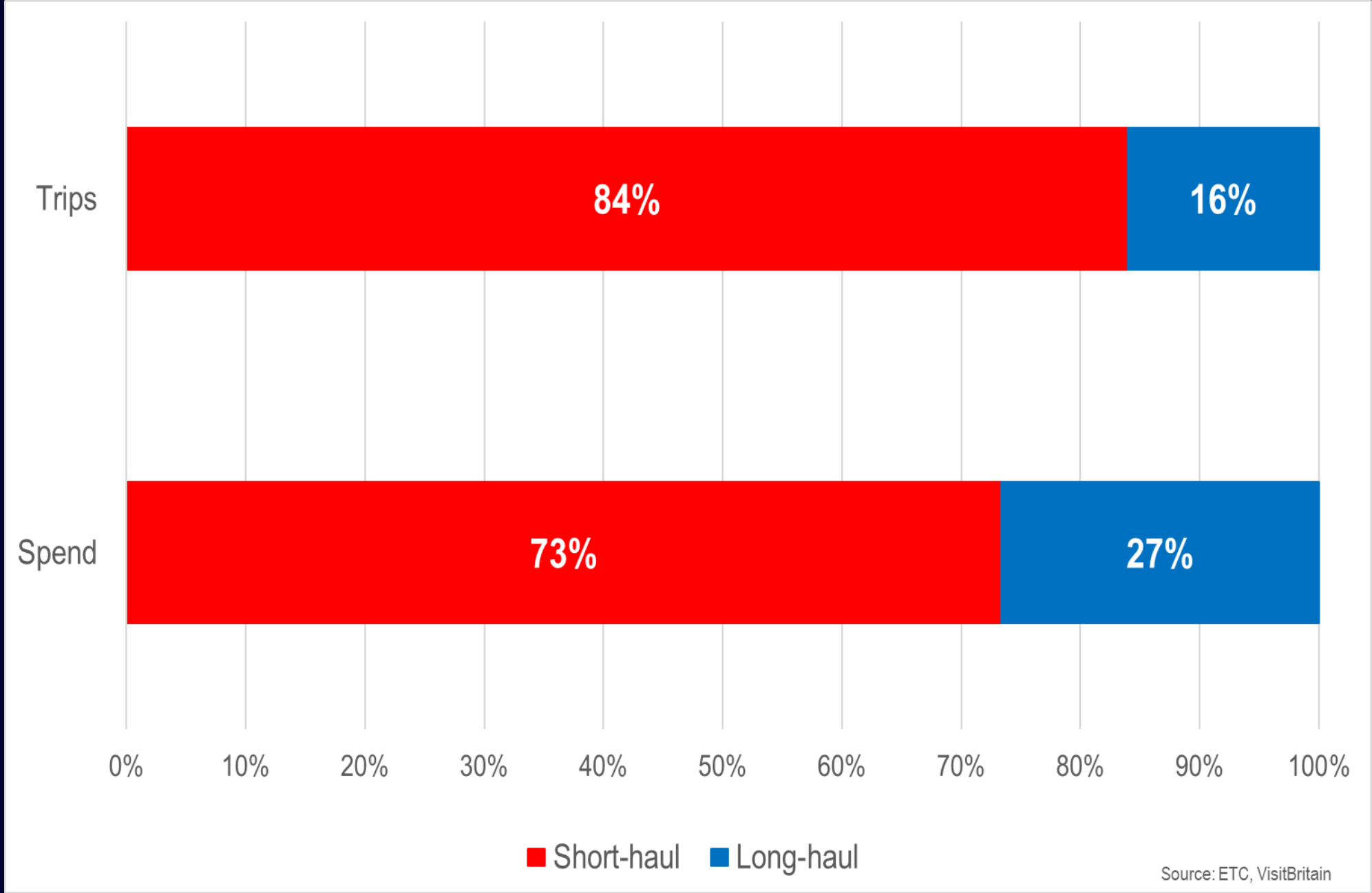


■ International visitor spending

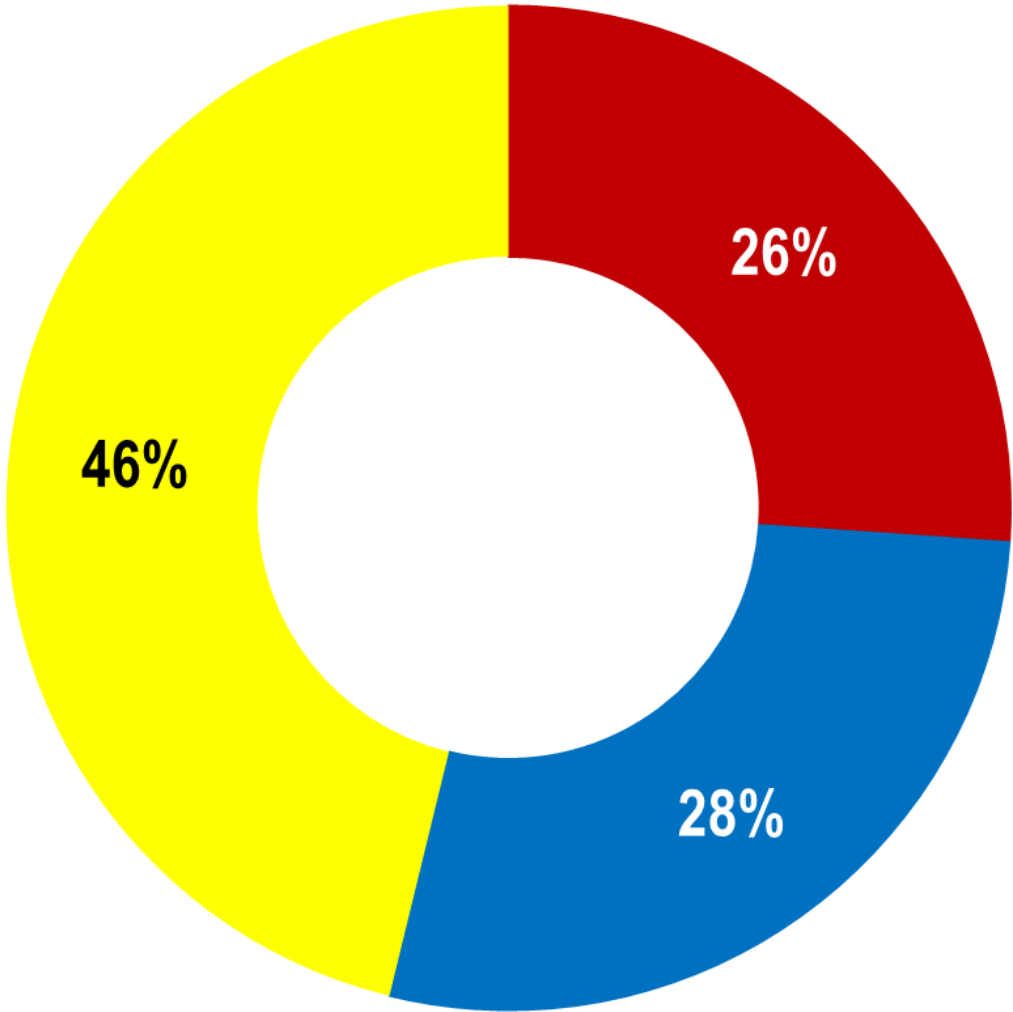
■ Domestic visitor spending

Source: WTTC

Origin of international trips and expenditure in Europe



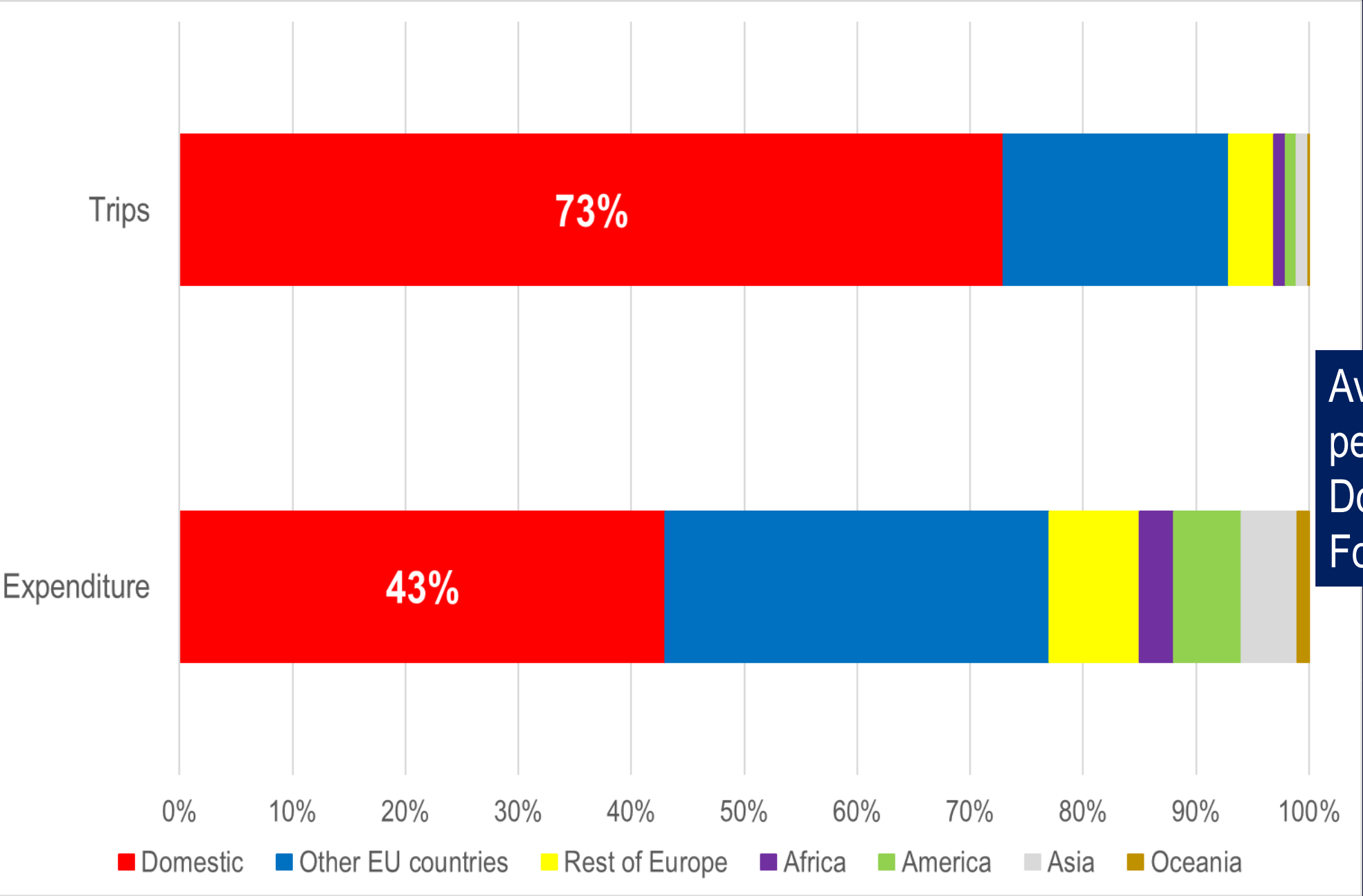
Visitor spending in Great Britain



■ Inbound tourism (Yr to Jun 24) ■ Domestic overnight tourism (2024) ■ Domestic tourism day visits (2024)

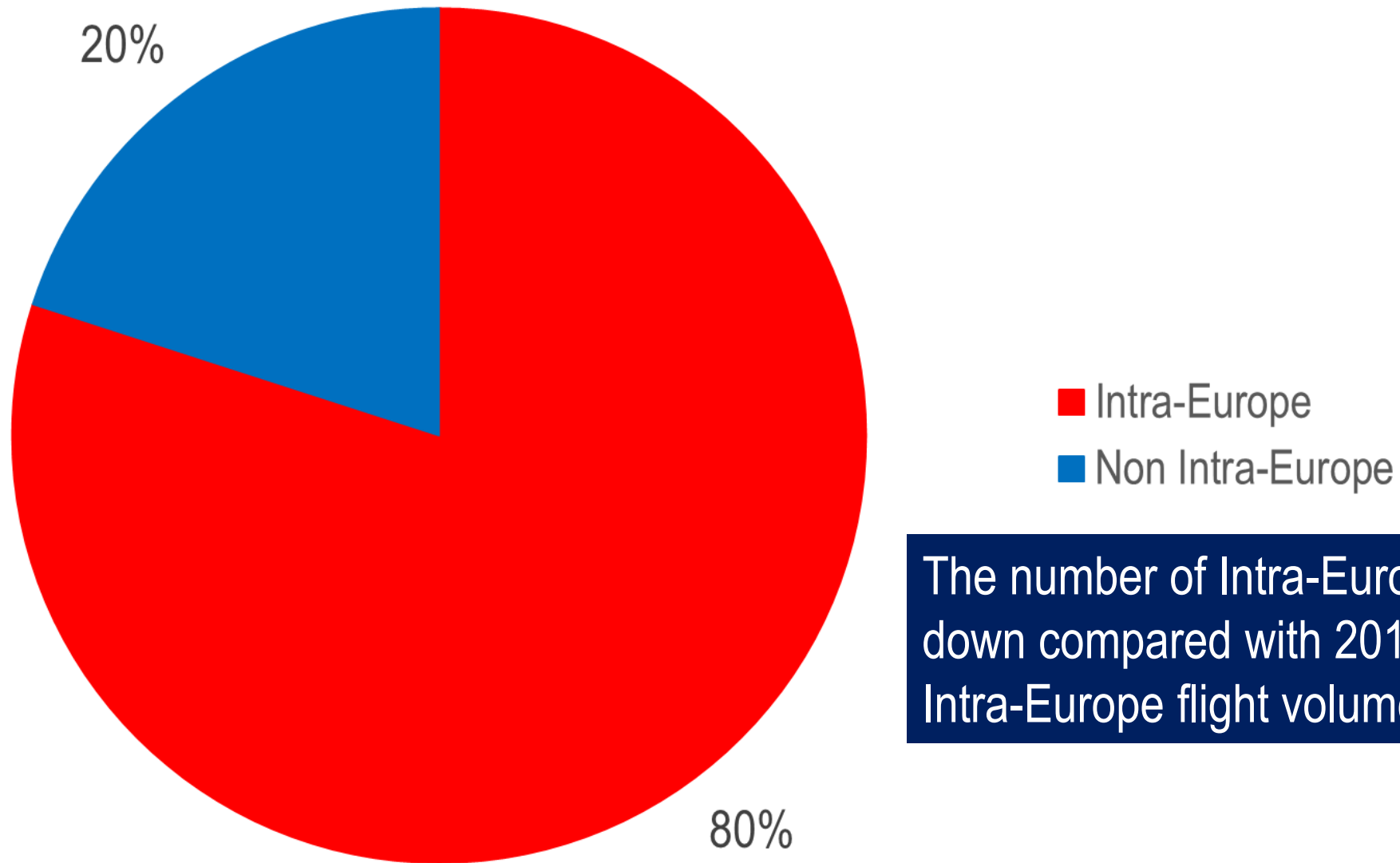
Source: VisitBritain

Trips and expenditure by EU citizens, by destination in 2023



Average expenditure
per trip:
Domestic €289
Foreign €1,013

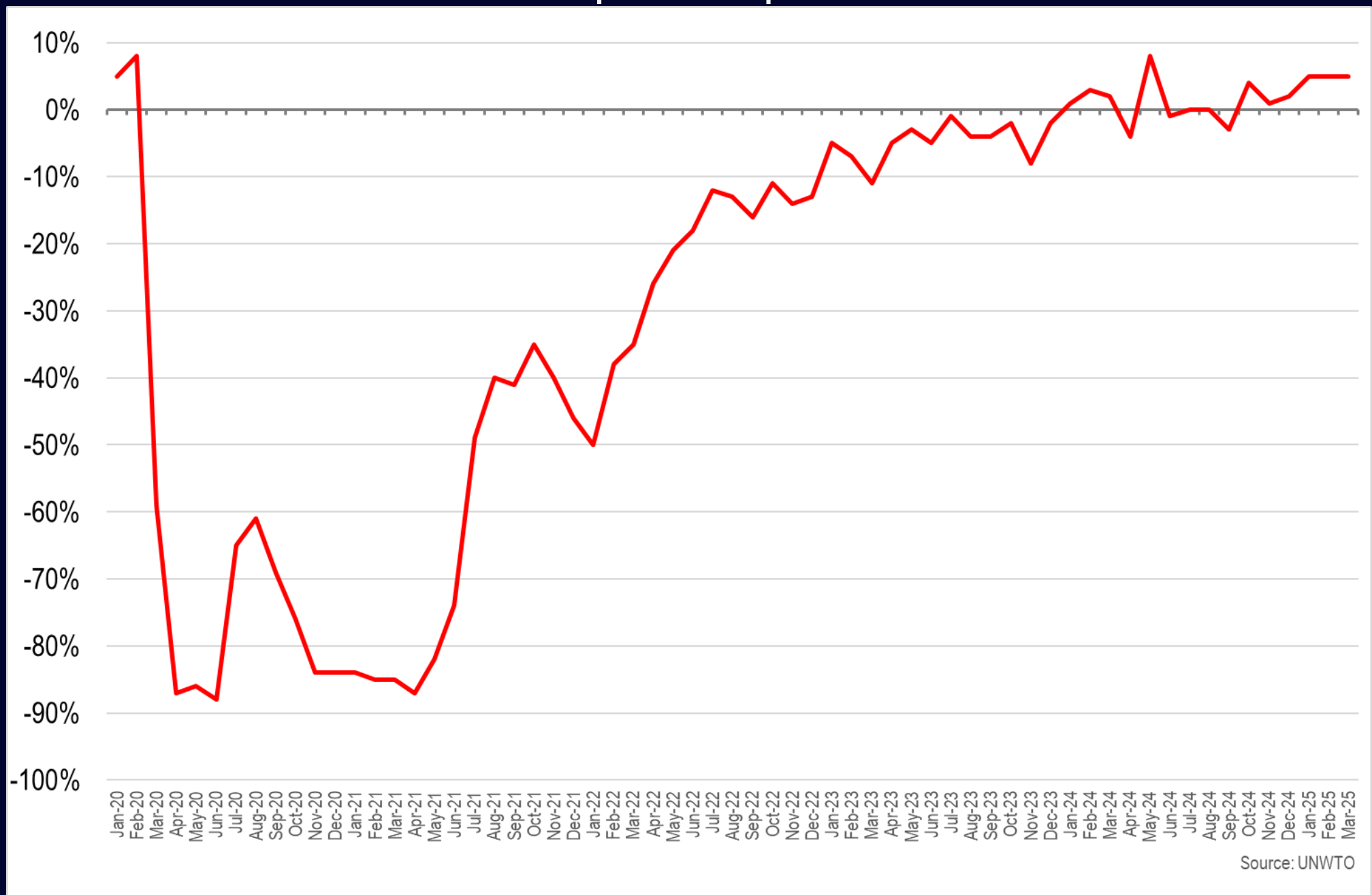
Flight arrivals/departures in Europe (1 January – 11 May 2025)



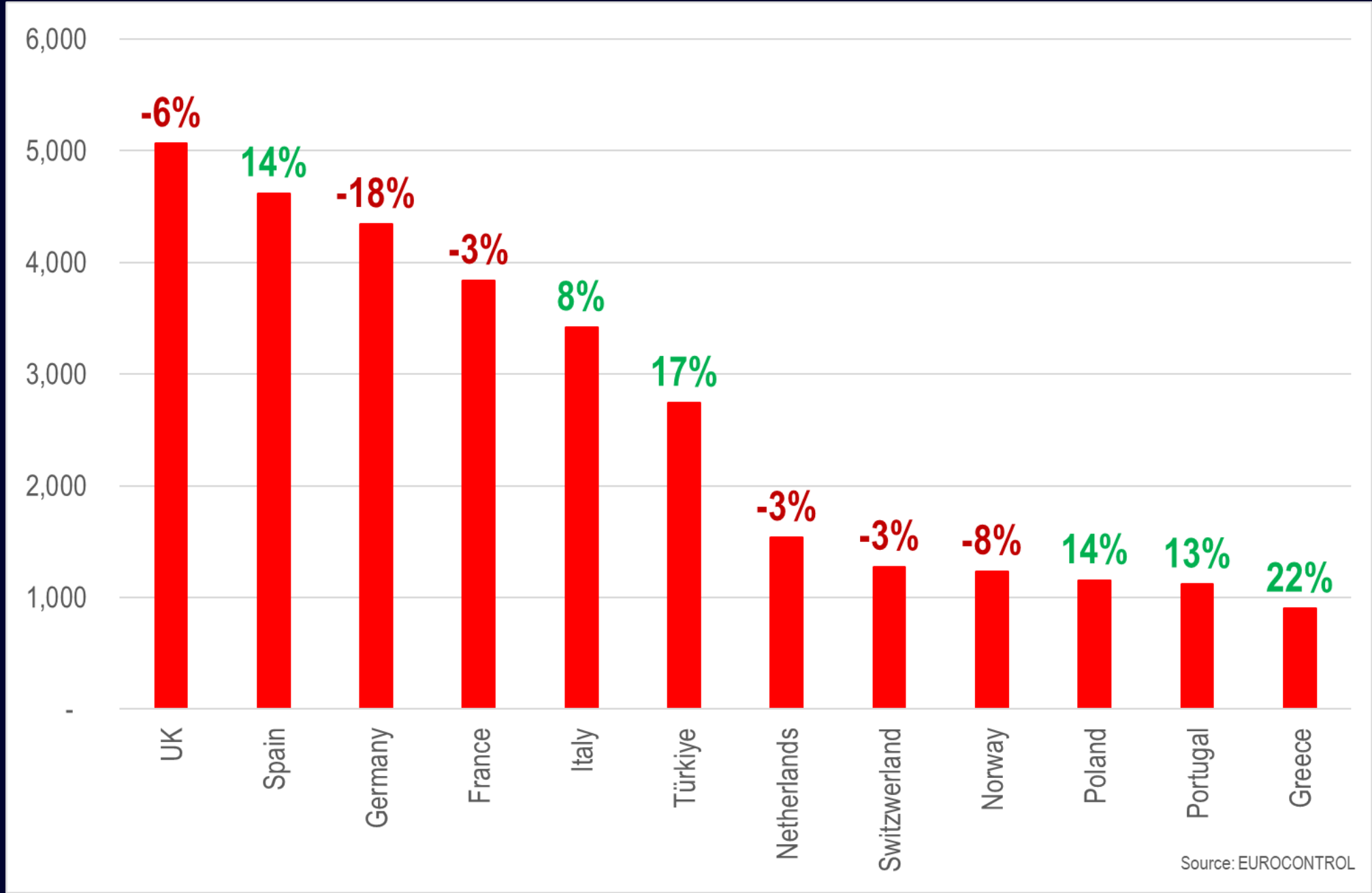
The number of Intra-Europe flights is 1% down compared with 2019, whereas Non Intra-Europe flight volumes are up 4%

Source: EUROCONTROL

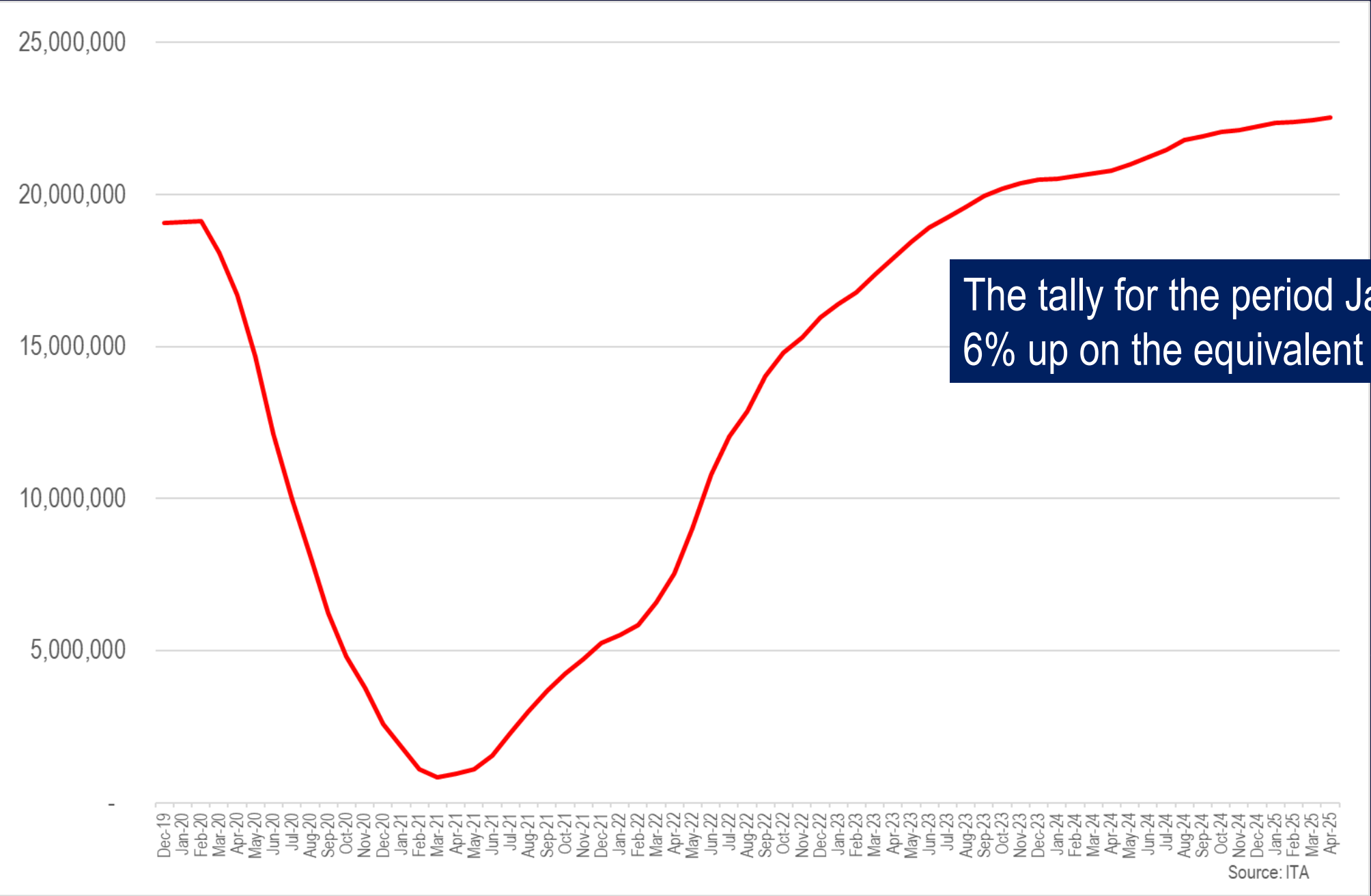
International arrivals in Europe vs equivalent month in 2019



Average daily flight arrivals/departures: year-to-date 2025 and change vs 2019

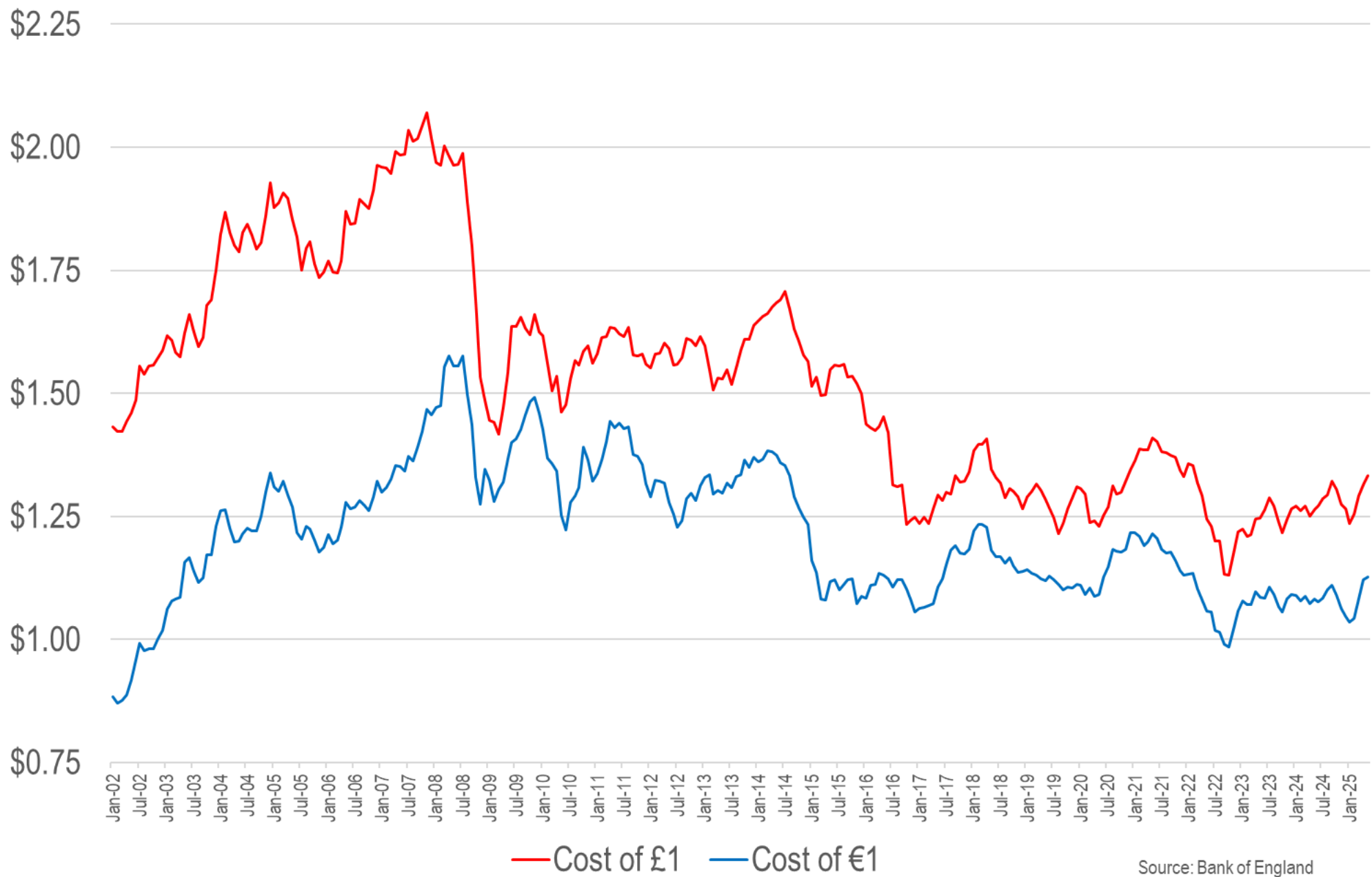


US citizens boarding a plane in the US destined to land in Europe (rolling 12-month tally)



The tally for the period January to April was 6% up on the equivalent period of last year

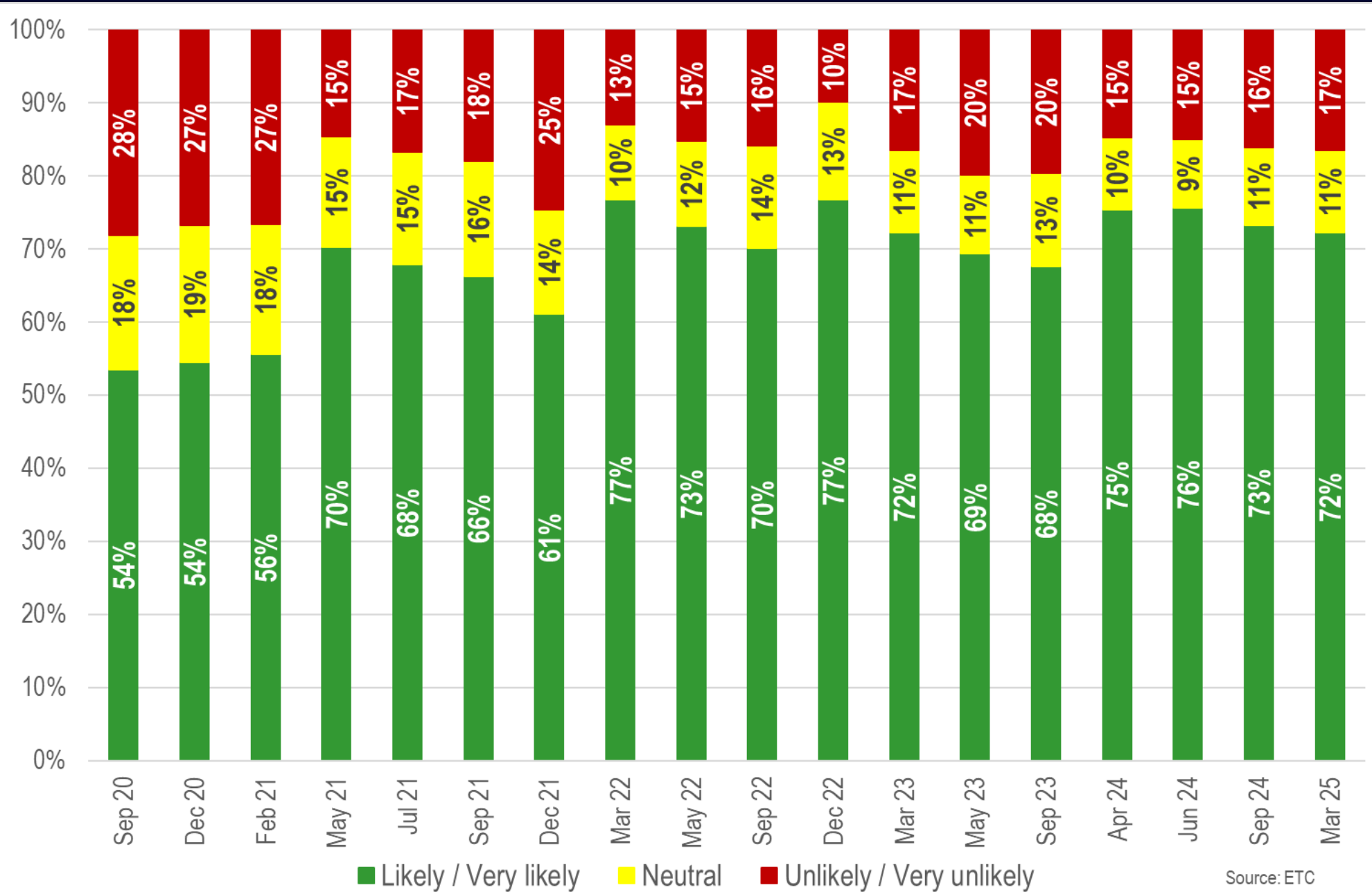
How much it costs Americans to buy pounds or euros



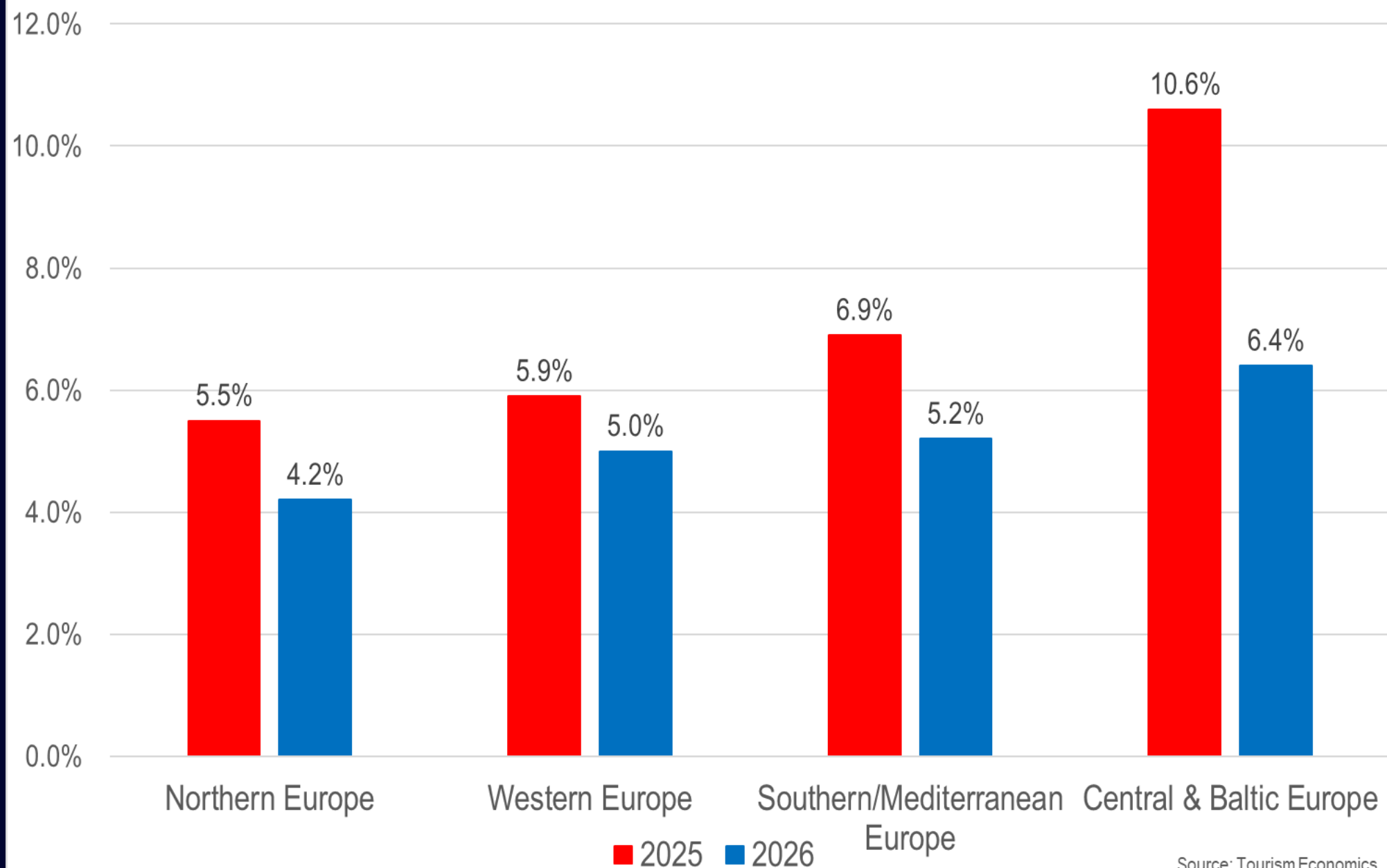
What the IMF is forecasting for real GDP growth

	2025	2026
Australia	1.6%	2.1%
Brazil	2.0%	2.0%
Canada	1.4%	1.6%
China	4.0%	4.0%
France	0.6%	1.0%
Germany	-0.1%	0.9%
India	6.2%	6.3%
Italy	0.4%	0.8%
Japan	0.6%	0.6%
Korea	1.0%	1.4%
Netherlands	1.4%	1.4%
New Zealand	1.4%	2.7%
Saudi Arabia	3.0%	3.7%
South Africa	1.0%	1.3%
Spain	2.5%	1.8%
United Arab Emirates	4.0%	5.0%
United Kingdom	1.1%	1.4%
United States	1.8%	1.7%

Europeans' intention to travel for leisure within Europe



Tourism Economics forecast for inbound tourism growth



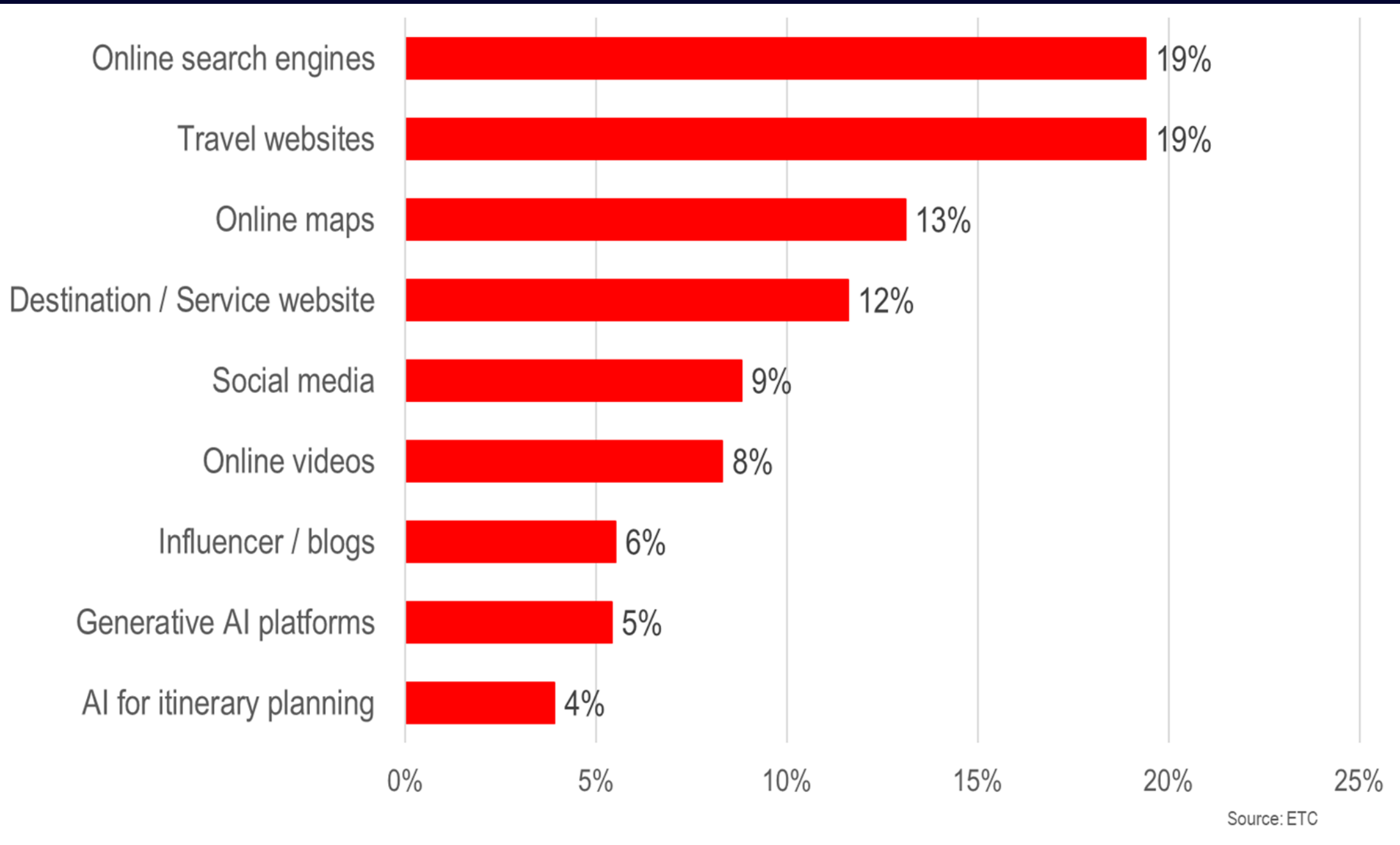
Considerations seen as “Extremely important” when deciding on a destination

Offers good value for money	66%
Is a welcoming place to visit	64%
Is good for relaxing, resting, recharging	61%
There is beautiful coast and countryside to explore	61%
I can roam around visiting many types of places	60%
It's easy to get around once there	60%
There is a good variety of food and drink to try	57%
It's easy to get to	55%
Is a place where I can explore history and heritage	54%
Offers lots of different experiences in one destination	54%
It has experiences I can't have anywhere else	53%
There are vibrant towns and cities to explore	53%
for seeing famous sites, places, ticking off the 'must do' list	52%
Is inclusive and accessible for visitors like me	51%
Is good to visit at any time of year	50%
It has surprising and unexpected experiences	48%
Is a mixture of old and new	47%
Has an interesting mix of cultures from around the world	46%
There are interesting local people to meet	45%
It offers the opportunity to travel sustainably/responsibly	44%
Has a thriving arts and contemporary culture scene	41%
A good place for treating myself	40%
A place recommended by friends or family	40%
If I don't visit soon, I'd miss out	35%
Offers experiences I want to share on social media	34%

Findings based on research undertaken by VisitBritain, with percentages being the proportion who scored each aspect as 5, 6 or 7 on a 7-point scale from “not at all important” to “extremely important”



European travellers preferred digital tool to plan their next trip



Travel Experiences Trends

Tours, activities, attractions & the opportunity for destinations

**ETOA –
Destinations Exchange Europe**

June 2025

Ramon Pons

Head of Partnerships

The ARIVAL logo, featuring a stylized 'A' composed of two overlapping triangles (one red, one blue) followed by the word 'RIVAL' in a bold, white, sans-serif font. The logo is set against a dark blue background that curves upwards from the bottom right corner of the slide.

You know Experiences

www.arival.travel



“Tours & Activities”

Ancillary

Extra

Add-on





Stays

Flights

Cars

Packages


Things to do

Cruises

1 room, 2 travelers ▾

 Going to

 Check-in
Feb 26

 Check-out
Feb 27

☐ Add a flight

☐ Add a car

Search

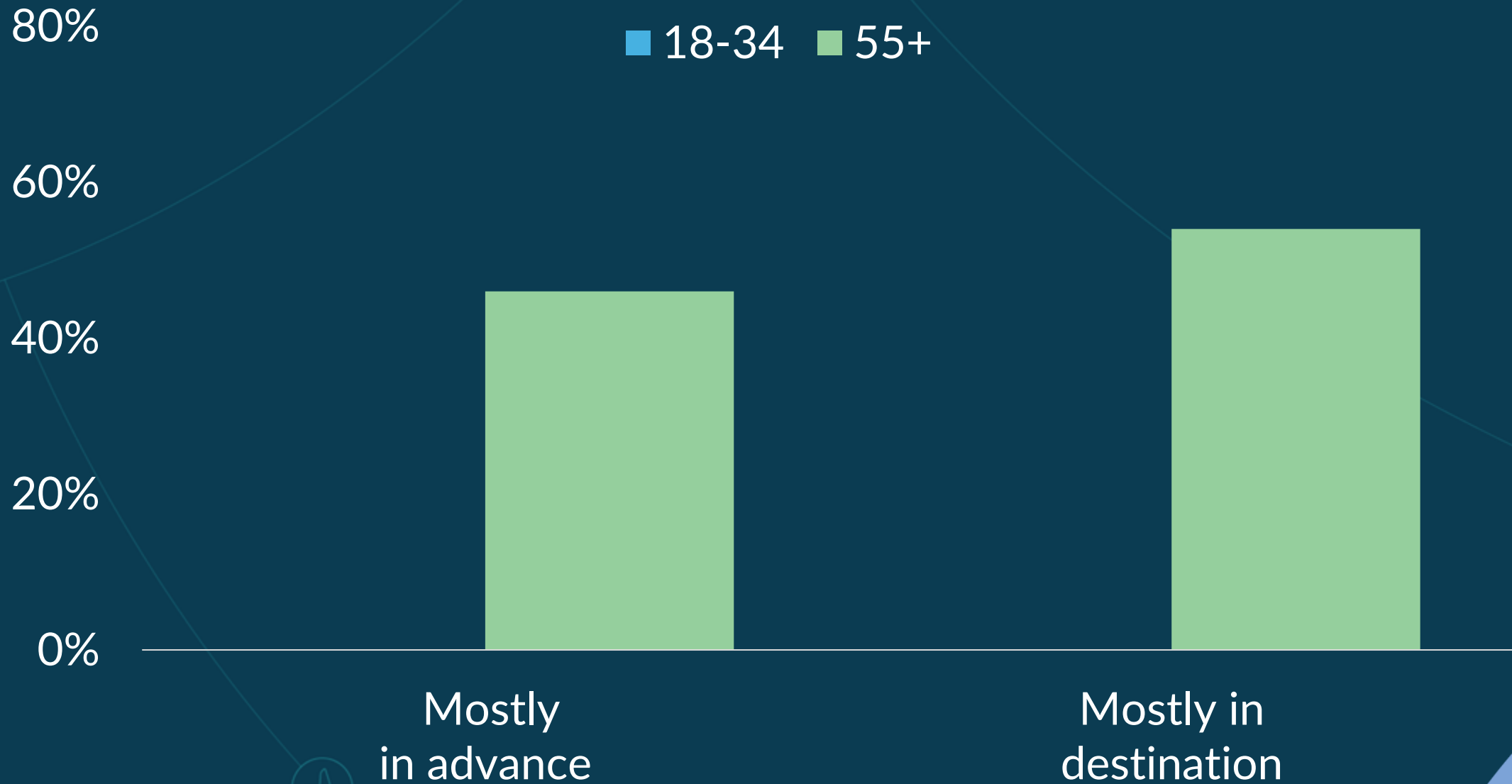
no longer an “Add-on”



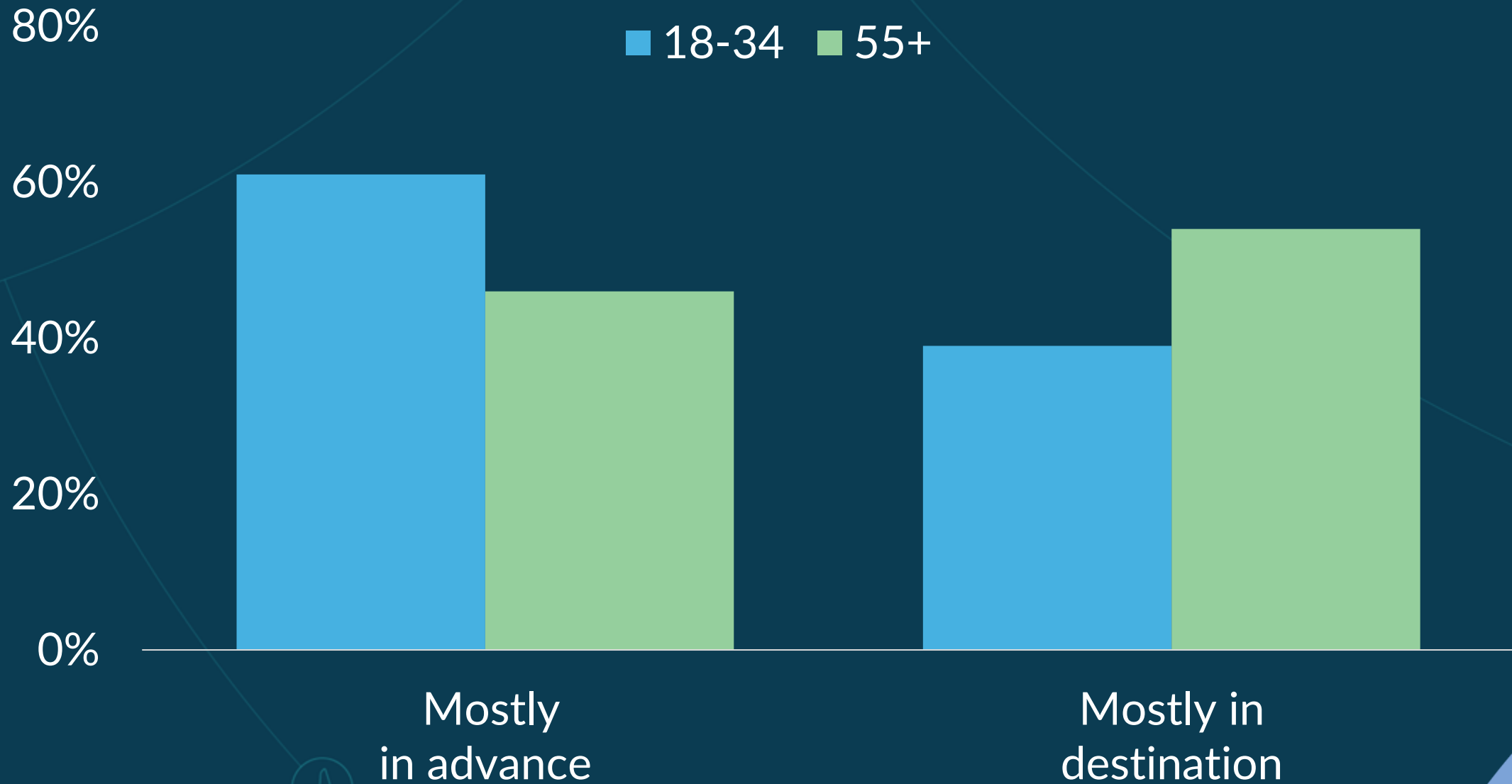
65% say
experiences
influence
where to go



When Travelers Plan Experiences



When Travelers Plan Experiences



Things to Do

The Reason to Go

The Why of Travel





The Best Part of Travel



Experiences sector

(Tours, Activities, Attractions, Events)



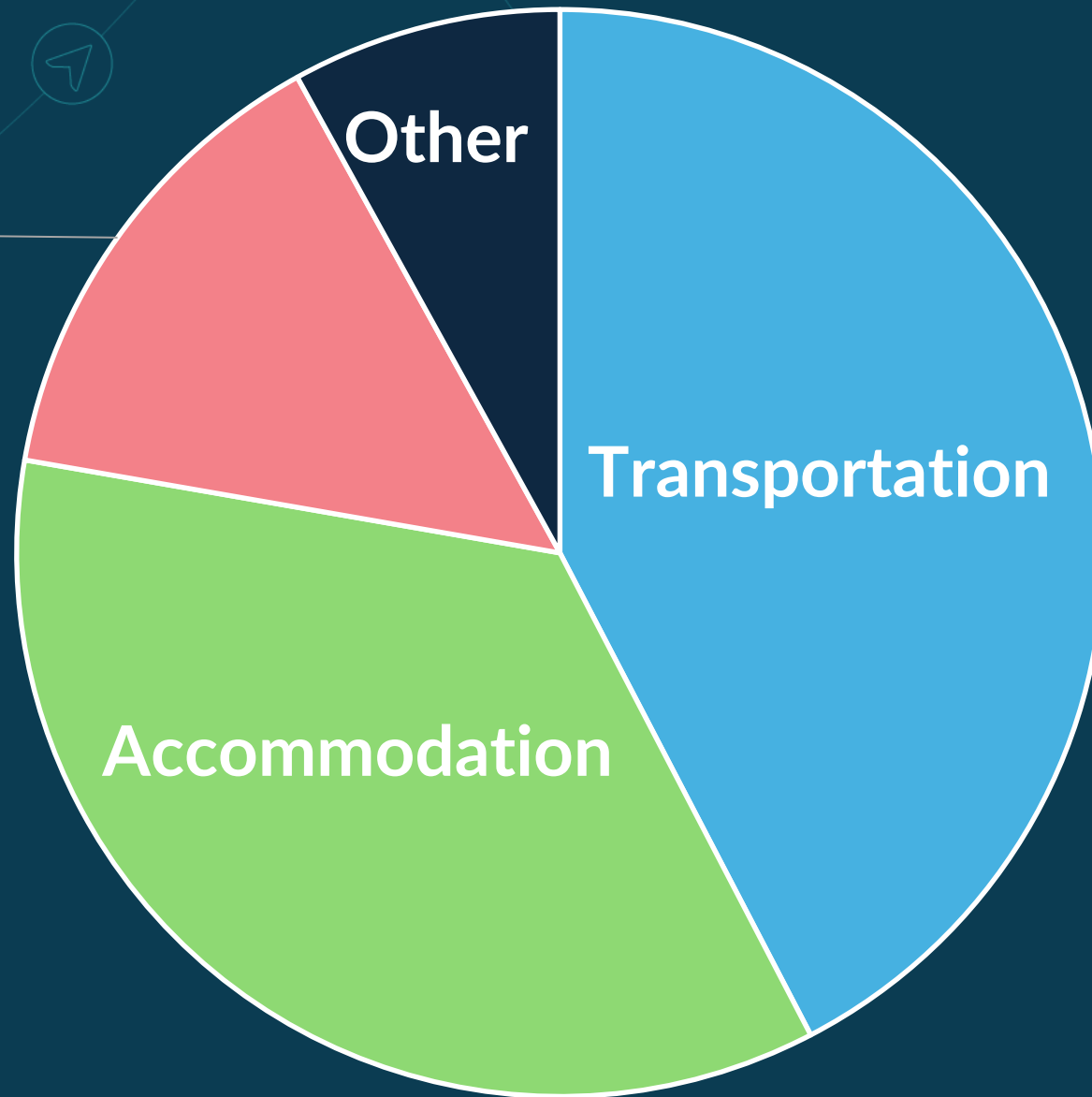
1) It's Big



~\$265 Billion
(2024)



Experiences



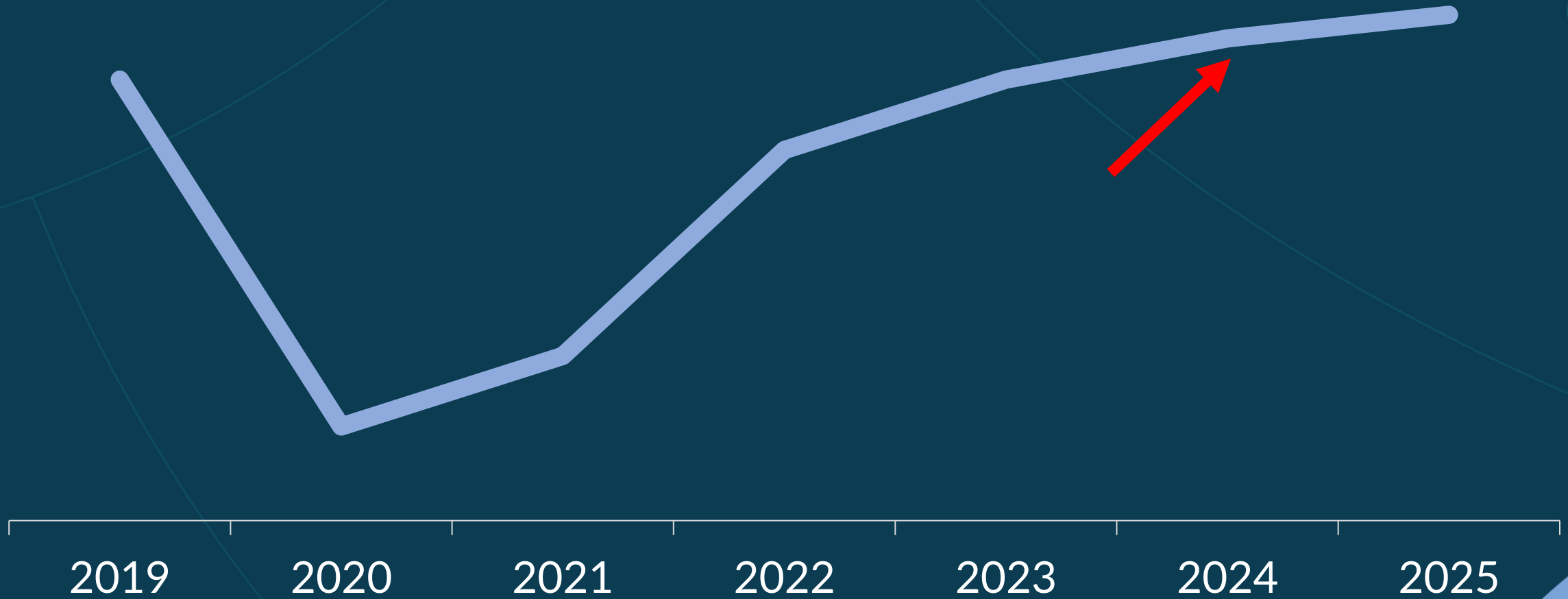
Accommodation

Other

Transportation



European Experiences Bookings



2) It's Fragmented



Lots of operators...





8 in 10
are SMEs
($< \$1\text{M}$ in sales)



...and categories

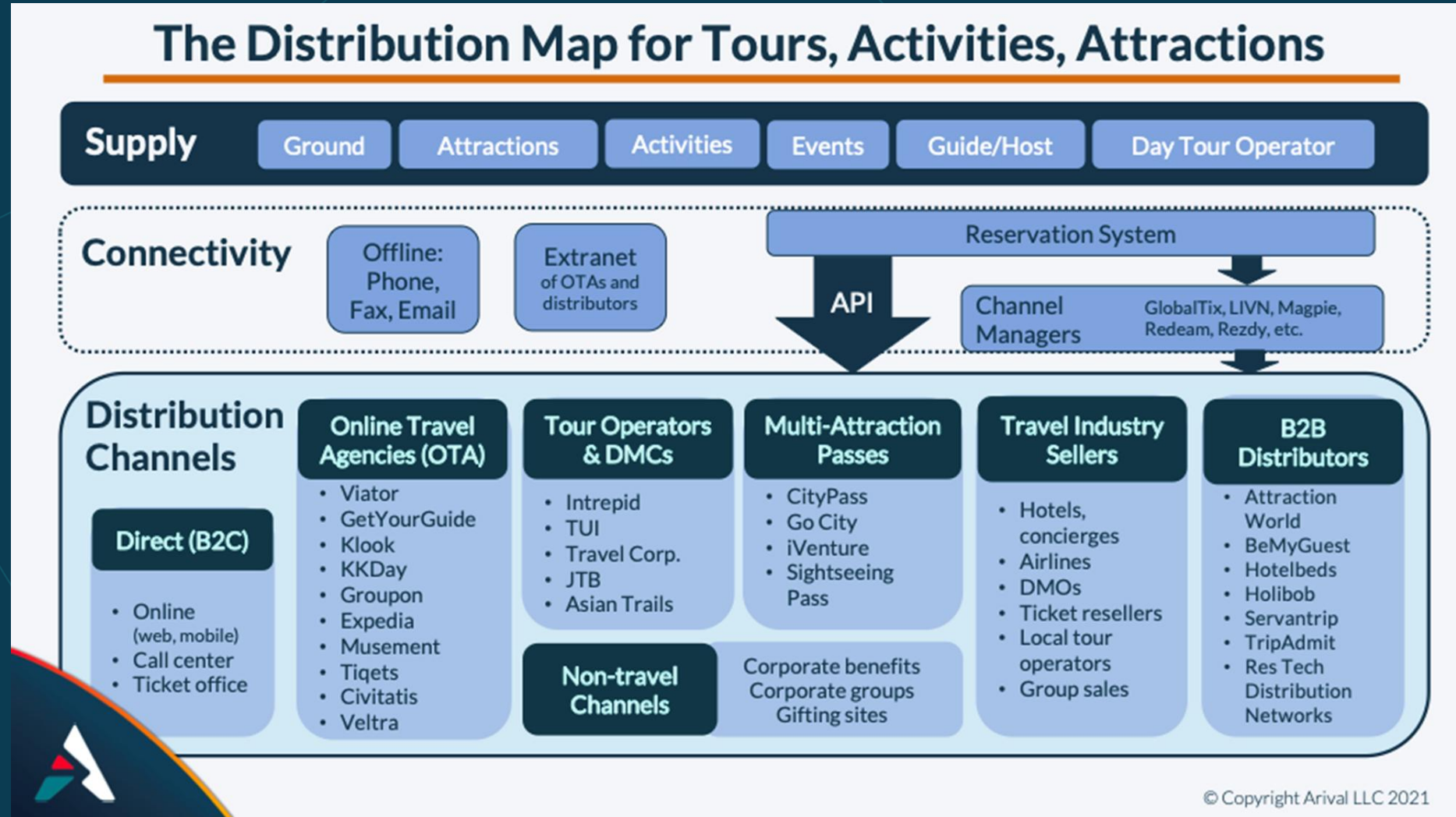


>150 Industries

Four-Wheel Drive (4WD) Tours & Excursions Dolphin & Whale Watching Parasailing & Paragliding Adrenaline & Extreme Tours Duck Tours Photography Tours Air Tours Eco Tours Private Tours Ancient Ruins Factory Tours Rail Tours Antique Stores Fashion Shows & Tours River Rafting & Tubing Aquariums Fishing Charters & Tours Room Escape Games Archaeology Tours Food Tours Running Tours Art & Music Tours Gear Rentals Safaris Art Galleries Ghost & Vampire Tours Scavenger Hunts Art Museums Ghost Towns Scenic Railroads ATV & Off-Road Tours Golf Courses Science Museums Auto Race Tracks Gondola Cruises Scooter & Moped Tours Ballets Helicopter Tours Scuba & Snorkeling Balloon Rides Hiking & Camping Tours Segway Tours Battlefields Historic Sites Self-Guided Tours & Rentals Beer Tastings & Tours Historical & Heritage Tours Shark Diving Bike Tours History Museums Shooting Ranges Boat Rentals Hop-On Hop-Off Tours Shopping Tours Boat Tours & Water Sports Horse-Drawn Carriage Tours Sightseeing Tours Bus Tours Horseback Riding Tours Ski & Snow Tours Bus Transportation Hot Springs & Geysers Skydiving Canyoning & Rappelling Tours Kayaking & Canoeing Specialty Museums Castles Lessons & Workshops Speed Boats Tours Caverns & Caves Lighthouses Stand-Up Paddleboarding Children's Museums Marinas Surfing City Tours Military Museums Swim with Dolphins Classes & Workshops Monuments & Statues Theme Parks Climbing Tours Motorcycle Tours Tours Club & Pub Tours Movie & TV Tours Walking Tours Coffee & Tea Tours Multi-day Tours Water & Amusement Parks Concerts & Shows Museums Water Parks Cooking Classes National Parks Waterskiing & Jetskiing Cultural Tours Natural History Museums Windsurfing & Kitesurfing Cycling tours Nature & Wildlife Tours Wine Tours & Tastings Dams Night Tours Wineries & Vineyards Day Trips Observation Decks & Towers Zipline & Aerial Adventure Parks Dinner Theaters Observatories & Planetariums Zoos Distillery Tours Off-Road & ATV Trails



In-destination experiences sector ecosystem: Distribution, commercialization and connectivity



3) It's Low Tech



2 in 5 operators
(Don't use a booking system)

12% of operators
(Say they are using Generative AI
actively in their operations)



4) It's Changing

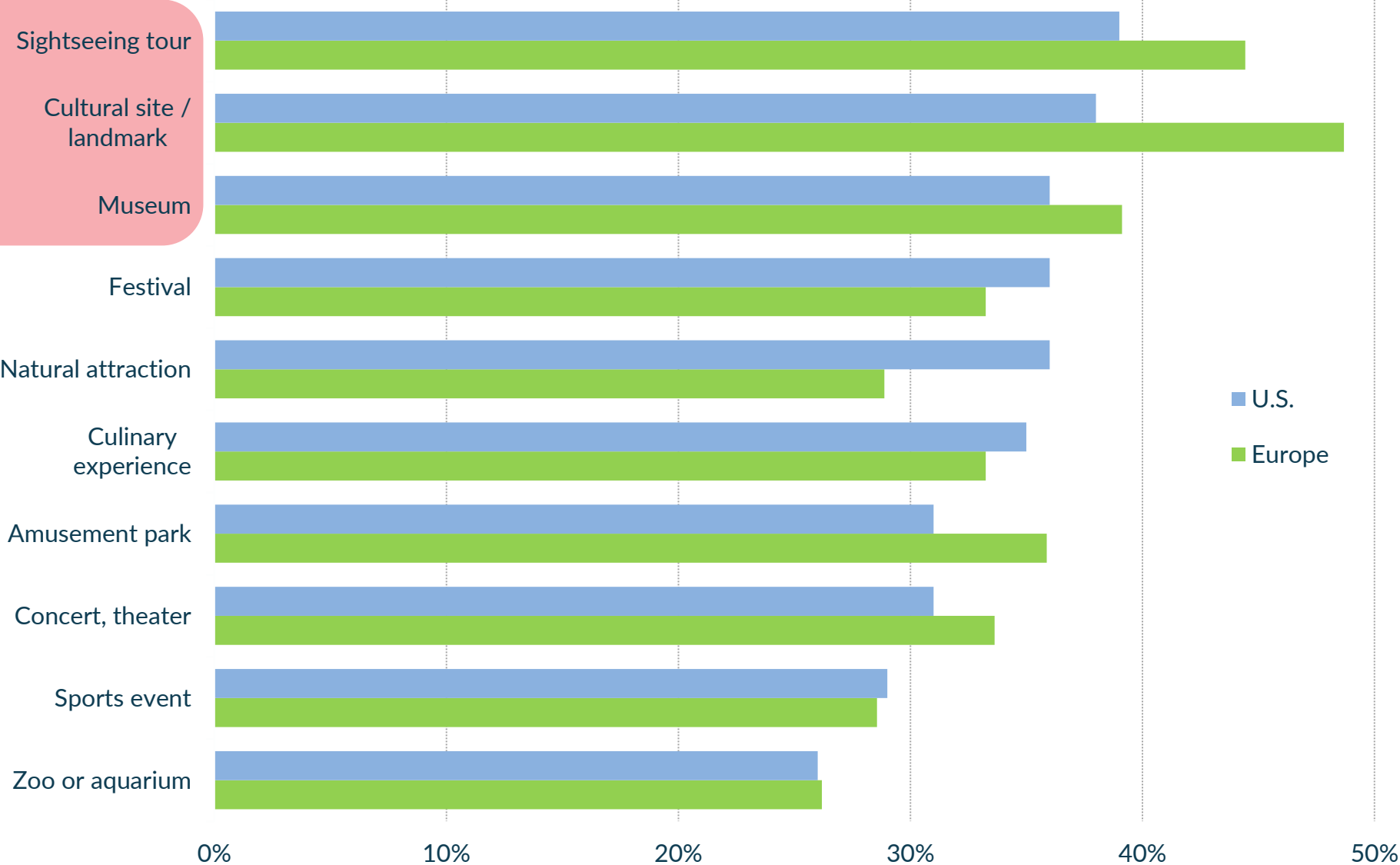


Seeing Isn't Enough



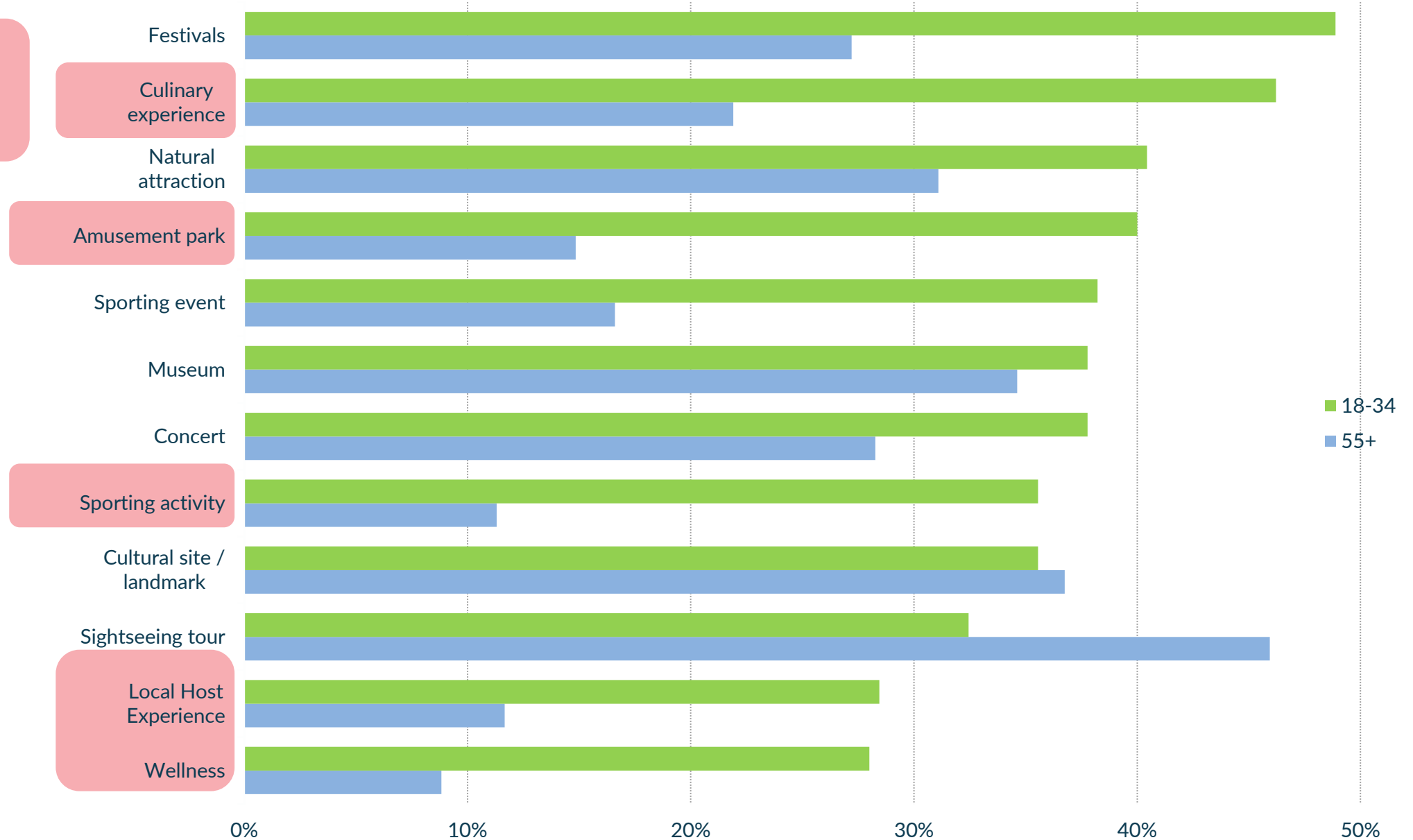
The Top Ten Experiences Booked, All Travelers

Attractions,
Sightseeing
on Top



The Top Experiences Booked, by Age

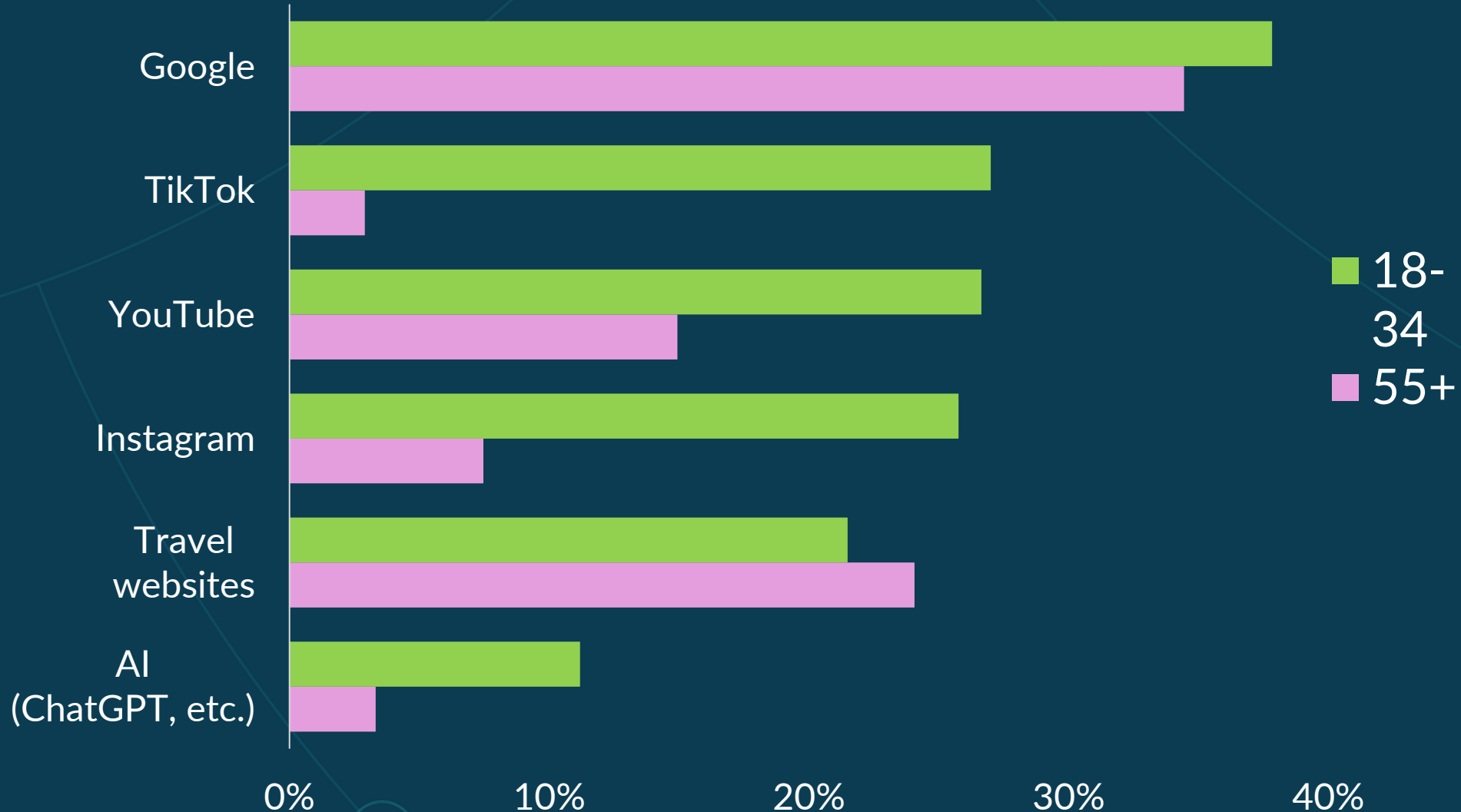
Immersive Experiences



The Fastest-Growing Experience Categories

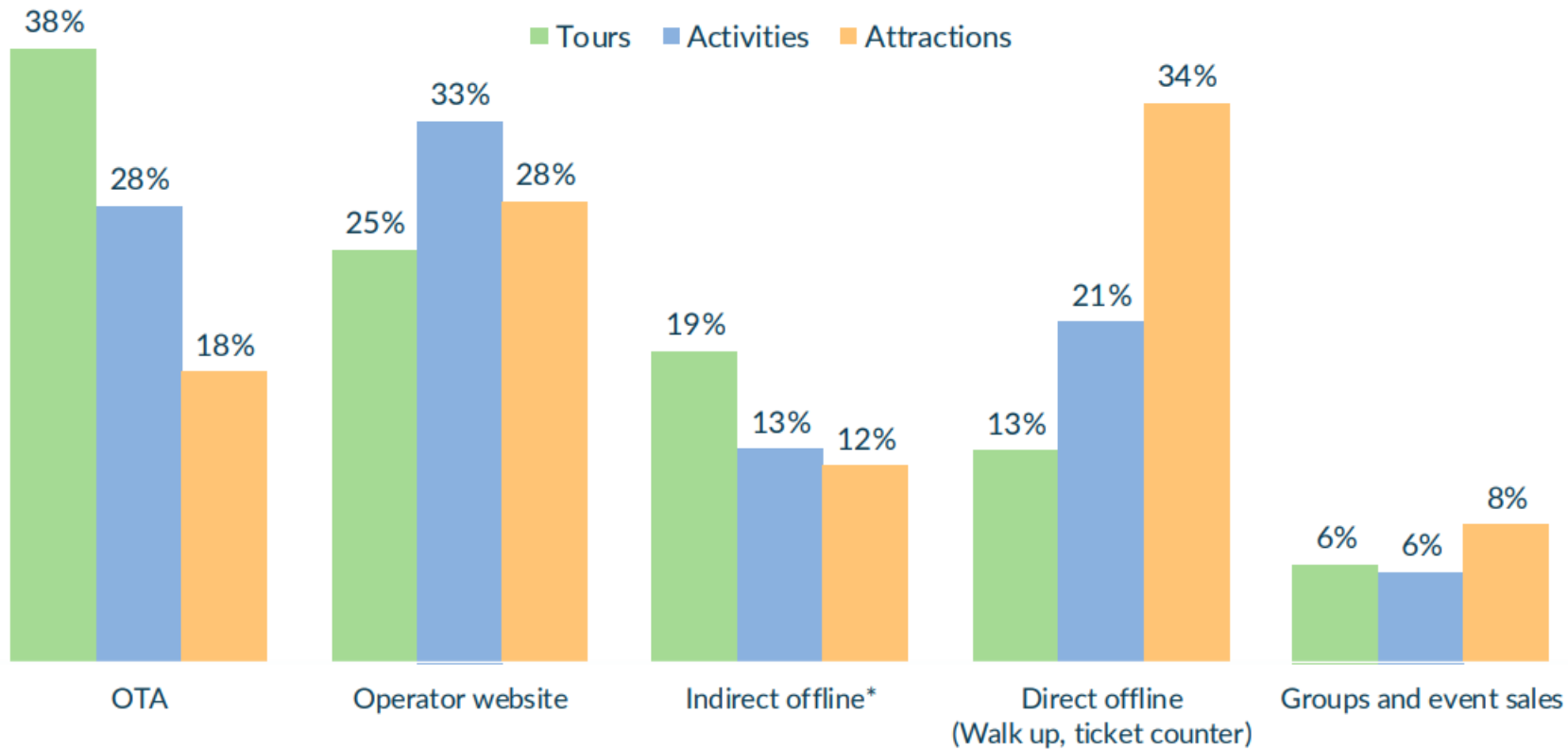


How They search



How They Book – by channel

How They Book: Channel Mix by Experience Type (2024)



* Travel trade (tour operators, travel agents, wholesalers, etc.)



5) It's Low DMO



Fewer than 1 in 5 operators

Say they work with their DMO



Key Recommendations for DMOs

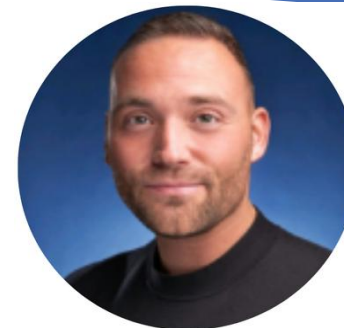
- ❖ Develop strategic planning models to provide greater support to experience suppliers
- ❖ Offer assistance for the digitalization of their businesses — support and visibility
- ❖ Create strategies to reduce overtourism in certain destinations / Work to extend the tourist season to reduce pressure on peak periods
- ❖ Use data to encourage different visitor flows than the current patterns.





**The Best Part of
Travel**

www.arrival.travel



Emerging Trends in Travel Demand | Insights into Europe's Visitors and Their Evolving Preferences

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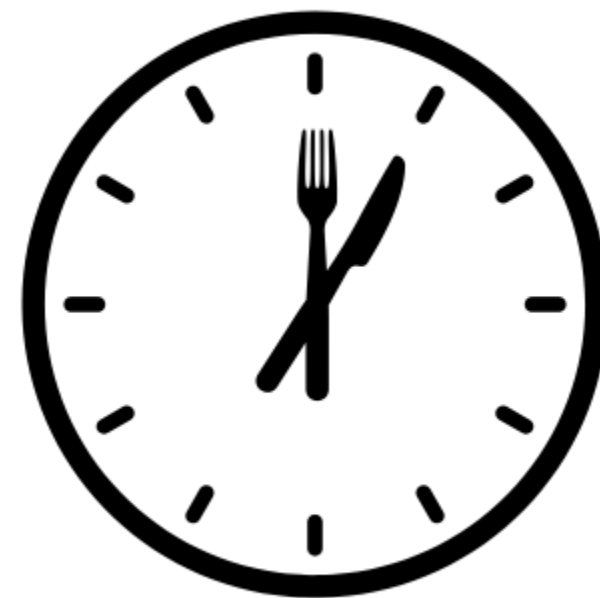


An update from ETOA and City Destinations Alliance (CityDNA) on developments, initiatives, & resources

- Tom Jenkins, CEO, ETOA
- Barbara Jamison-Wood, President, City DNA / Head of Europe, Convention Bureau, London & Partners

Networking Lunch... Enjoy!

... See you at 14.00



EU to Local: Tourism Policy & Practice

EU Sustainable Tourism Strategy

- Ideas wanted!
- Survey deadline: 15 August

Destinations and travel trade collaboration

- What does good look like?
- policy@etoa.org





Destination Good Practice | Data practices, community engagement, and innovation

- Prof Xavier Font, University of Surrey
- Dolores Ordoñez, AnySolution
- Łukasz Wysocki, CEO, Gdańsk Tourism Organisation
- Paola Guccione, Convention Bureau Genova
- Nollaig Fahy, Dublin City Council Culture Company



COMUNE DI GENOVA

DESTINATION GENOVA

The award as the **Best in travel 2025** by Lonely Planet celebrates the city as a destination of great charm and interest for travelers from all over the world. A city rich in history, culture with attractions like the **Palazzi dei Rolli**, the historic center and maritime traditions, capable of offering unique experiences thanks to its architectural heritage and the natural beauty that surrounds it.

Genoa is actually an emerging, **sustainable**, accessible and inclusive destination model focusing on **deseasonalisation** and ready to welcome visitors .



Genoa Best in Travel 2025





COMUNE DI GENOVA

DESTINATION GENOVA



Annual Overnight Stays

2023-2024 + 4.9%

2019-2024 + 38.46%



Cruise Passengers

Annual Passengers 1,500,000



Annual Arrivals

2023 -2024 +0.95%



Hotels & Accommodation

Hotels: 96 properties

Other Accommodation Facilities:
Over 3,000



International Visitors

2023-53% of total arrivals

2019-2024 +13%



Average Hotel Rate*

Approx. €140 per night



Airport

Distance from City 6 km



Average Length of Stay

6.5 nights



Data



Tourist offer related to **COMUNE DI GENOVA**

DESTINATION GENOA

Unesco Heritage.
The **Rolli Experience** is scheduled on the following dates:

2025

October

Friday 24-Saturday 25-Sunday 26

November

Friday 14-Saturday 15-Sunday 16

December

Friday 12-Saturday 13-Sunday 14

2026

January

Friday 16-Saturday 17-Sunday 19

February

Friday 13-Saturday 14-Sunday 15



The **Rolli Palaces** are **42 buildings** belonged to the ancient and richest families of the Renaissance period that are rich of history and culture of the past. The **Rolli Experience**, it's an immersive initiative in which the tourist can spending a long week-end in selected accommodations. The Rolli experience includes guided thematic tours to historical centre, gastronomic Genoese and typical food presentations, and expert led-visit to the most prestigious Rolli Palaces. To enhance the experinece, there are musical performances, aperitifs, tastings and themed dinners set among the fine furnishing and frescoed ceilings of the spectacular Genoese noble residences.



Genova: le Strade
Nuove e il Sistema dei
Palazzi dei Rolli
Inscritto nella lista del Patrimonio Mondiale nel 2006

UNESCO Heritage :The Rolli experience and historical center





COMUNE DI GENOVA

DESTINATION GENOVA



The typical historic shops in Genoa are located in the Genoese narrow streets called «caruggi» in Genoese dialect.

An attractive mix of smells, tastes and culture throughout history.

Genoa and Liguria are known for their authentic Mediterranean cuisine, a rich gastronomic tradition that emphasizes simple ingredients. A typical example, the famous **focaccia** and **pesto**.



our identity : eno-gastronomic excellence and the typical historic shops in Genoa



BOTTEGHE
STORICHE
DI GENOVA





COMUNE DI GENOVA

DESTINATION GENOVA



A system of vertical connections, including funiculars and elevators, links the sea to the mountains above the city, leading to the **Parco delle Mura**, a magnificent green route connecting the 17th, 18th, and 19th-century walls, offering breathtaking panoramic views and represent the typical example of sustainable mobility. The **mild climate** characterize Genoa. Genoa was the destination of the **Red Bull urban downhill event**. The **new project Genova Outdoor** has been developed with the aim of making Genoa a European capital of eco-sustainable tourism, an opportunity for economic growth. It includes **26 itineraries**, each of them equipped with safety information, GPS track and scale map, all reachable and usable by public transport and smart mobility to propose a model of eco-compatible tourism.



Vertical City, forts, outdoor and sustainability

https://smart-tourism-capital.ec.europa.eu/best-practices/european-capital-smart-tourism-best-practices_en





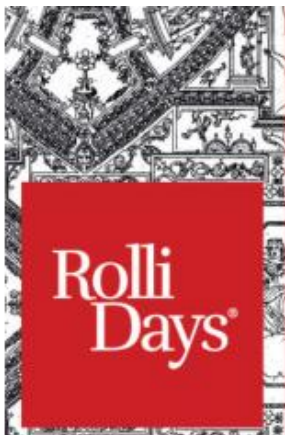
COMUNE DI GENOVA

DESTINATION GENOVA

Rolli Days

February 15-16; April 26-27 and May 2-3; October 2025

Weekends of extraordinary openings of the Palazzi dei Rolli – UNESCO Heritage; their stories are told by Science Popularizers



Euroflora 2025

April 24 – May 4, 2025
Prestigious international flowers exhibition. Setting of this year edition will be the new Waterfront di Levante



Summer open-air concerts and events

June - July 2025
Open-air concerts and events will liven the Genoese summer nights up



Nervi Music Ballet Festival

July 2025
Music, dance and prose, with national and international performances in the wonderful setting of Nervi's Parks



The Ocean Race Europe

September 3-7, 2025
The famous round-the-world regatta, that involves the planet's finest sailors, will be back to Genova for the second time



International Boat Show

65th Edition
September 18 – 23, 2025
Unmissable event for both the international yachting market and the sea enthusiasts.



Premio Paganini

58th Edition
October 14 – 26, 2025
Prestigious International violin competition named after the famous Genoese violinist Niccolò Paganini




Science Festival

October 23
November 2, 2025
The Genova Science Festival is one of the leading events in the dissemination of scientific culture and has become, over the years, an international point of reference.



Main events in Genoa



Smart Tourism: Collaborate to Innovate

Nollaig Fahy
Tourism Innovation Manager

Aonad Tuarasóireachta
Chathair Bhaile Átha Cliath
Dublin City Tourism Unit



Content:

- **Collaboration Model**
- **Tourism Unit What? Why? How?**
- **Tourism Strategy Goals**
- **Collaborate to Innovate Examples**

Collaboration Model

DCC City Development Plan 2023-2028

DCC Tourism Strategy 2023-2028

Steering Committee

Management Team

**Smart Tourism
Manager**

**Fáilte Ireland City
Orientation Group**

Unit Manager

**Dublin Regional
Tourism Group**

**Tourism Data
Lead**

EU Data Group

The Unit is funded by Dublin City Council, and supported by Smart Dublin and Dublin City Council Culture Company



What?

- The Dublin City Tourism Unit is responsible for creating, facilitating and fostering equitable development of tourism in our city.



Why?

- The Unit, built on the foundation of multi-stakeholder collaboration supports and delivers Dublin City Council's tourism vision, and agenda. Helping Dublin to achieve its tourism development goals.



How?

Our Strategic Goals: 2023-2028 - Tourism projects and initiatives in Dublin are:

Human: serves a people centered and community based growth agenda

Sustainable: is proactive, accountable and measurable toward our climate goals

Innovative: is future-facing, creative, collaborative and digitally-advanced

Our Tourism Strategy 2023-2028

- People
- Places and Spaces
- Culture
- Climate Action and Sustainability
- Innovation - *Collaborate to Innovate Examples*
- Data and Insights



Dublin Discovery App & Active Cities Project

Example 1

Combining in-house technology, culture and tourism expertise, along with external stakeholder know-how, Dublin City launched its first AR/VR self-guided trails application in Q4 2023.

Target Audience: Local communities, and visitors to Dublin City and County.

Number of Users: 22k+

Number of Trails: 2024 = 17 +10 by YE 2025 Total number of Project

Stakeholders: 15

Aonad Tuarasóireachta
Chathair Bhaile Átha Cliath
Dublin City Tourism Unit

Example 2

Two hi-tech street art sculpture installations designed to encourage people to meet and connect above borders were launched in Dublin and NYC on May 8th 2024. This project required the collaboration of 150+ people from multiple agencies and stakeholders working across several time zones.



**The People's Portal
Dublin & NYC**

Aonad Tuarasóireachta
Chathair Bhaile Átha Cliath
Dublin City Tourism Unit

Examples 3-7



DUBLIN 2024



Workshops & Events =165 Partnerships =10 Legacy Projects =12





Dublin City Tourism Unit

Thank you for listening!

Nollaig Fahy, Tourism Innovation
Manager

tourisminnovation@dublincitycouncilculturecompany.ie

www.dublincitycouncilculturecompany.ie

**Aonad Tuarasóireachta
Chathair Bhaile Átha Cliath
Dublin City Tourism Unit**



Destination Good Practice | Data practices, community engagement, and innovation

- Prof Xavier Font, University of Surrey
- Dolores Ordoñez, AnySolution
- Łukasz Wysocki, CEO, Gdańsk Tourism Organisation
- Paola Guccione, Convention Bureau Genova
- Nollaig Fahy, Dublin City Council Culture Company

Have a good break!

... See you at 15.15





Destination Good Practice | Data practices, community engagement, and innovation

- Tim Fairhurst, ETOA; Prof Xavier Font, University of Surrey
- Barbara Jamison-Wood, London & Partners
- Marion Bordenave, Paris Je t'aime
- Veronica Rossi, Turismo, Torino e Provincia - winner 2025 European Capital of Smart Tourism
- Chantal Pastoors, The Hague Marketing Bureau

DISCOVER TORINO, 2025 EUROPEAN CAPITAL OF SMART TOURISM







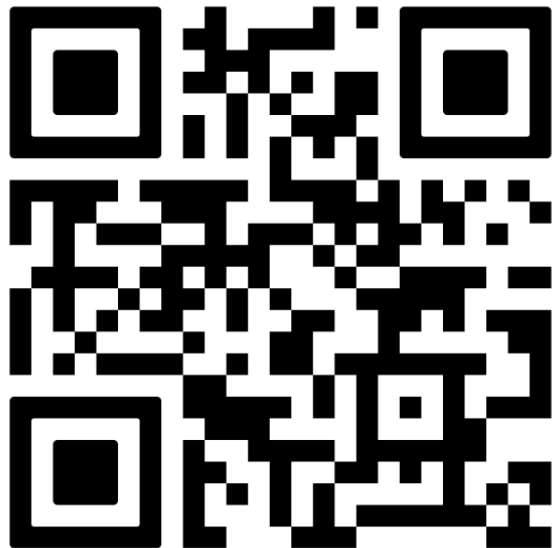
EUROPEAN CAPITAL OF SMART TOURISM

The **European Capital of Smart Tourism** is an initiative by the European Commission to recognize cities that lead the way in innovative and smart tourism solutions.

In 2025, **Torino** was selected among **21 candidate cities** from 10 countries — competing with seven finalists.

The focus is on 4 categories:

1. **ACCESSIBILITY**
2. **SUSTAINABILITY**
3. **DIGITALISATION**
4. **CULTURAL HERITAGE & CREATIVITY**





WHY TORINO IS A SMART DESTINATION?

Authenticity Value → Torino preserves and promotes its authentic identity by **protecting its rich cultural and natural heritage**.

A City for Everyone → Torino's tourism strategy **puts residents first**, fostering a vibrant, **inclusive city** that enhances quality of life for both locals and visitors.

Sustainable Innovation → Torino is leading the way in sustainable urban regeneration. By transforming its **industrial legacy into cultural hubs** and green spaces, the city is redefining itself as a creative centre for research, innovation, and the arts.

WHICH BENEFITS? DON'T BE AFRAID TO APPLY

- Preserve the values of the destination for tourists and residents alike
- Promote a series of specific USPs of Torino
- Join a network of smart cities that enables new relationships and the exchange of best practices at the European level
- It is a way to create a network within the destination itself and raise awareness among local stakeholders.

**THE NEXT 2026 ECST
COULD BE YOUR CITY!**



WORLD SUMMIT ON ACCESSIBLE TOURISM





10 GOOD REASONS TO CHOOSE TORINO

1. The **first capital of Italy**, before Florence and Rome
2. Home to the **Museo Egizio**, the oldest Egyptian museum in the world
3. The **National Cinema Museum**, located inside the Mole Antonelliana
4. The city where the **Holy Shroud** is kept
5. **Royal Residences** recognized as a **UNESCO** World Heritage Site
6. Home to **Leonardo da Vinci's** self-portrait
7. The capital of **Contemporary Art**
8. Famous for its **historic cafés** and **patisseries**
9. The capital of **taste, chocolate, and vermouth**
10. A city with **18 km of arcades** perfect for shopping

TOP TEN

PRODOTTI E SERVIZI TURISTICI
TOURIST PRODUCTS AND SERVICES
PRODUITS ET SERVICES TOURISTIQUES



TURISMO TORINO E PROVINCIA

Turismo Torino e Provincia is the official tourism board promoting Torino and its area as a top destination for leisure, culture, nature, sports, and business tourism.

We welcome tourists in our **Tourist Information Centres**.

We give information, promotional materials and provide **tourist products and services** to travel trade such as:

TORINO+PIEMONTE CARD

MERENDA REALE®

EXTRA VERMOUTH

WELCOME TOURS



FOCUS: TORINO+PIEMONTE CARD



Available in digital format via **QR code**: easy, convenient, and smart!

- **Valid for 1, 2, 3, or 5 days** for 1 adult and 1 child under 12
- **Junior Card** (up to 3 days) for visitors **under 18**
- **Free or reduced admission** to top museums, fortresses, castles, and **UNESCO Royal Residences** throughout Torino and Piemonte.
- **Exclusive discounts** on public transports, Tourist Services, the City Sightseeing Bus Torino, themed activities, guided tours, and major regional events.

Net rates available for travel professionals

FOCUS: FOOD & WINE NETWORKS

A trip to Torino also means a journey into taste:

EXTRA VERMOUTH

The authentic Torino tradition of aperitivo: a tasting of three Vermouth di Torino paired with five samples, including a sweet one, as tradition demands. (25)

MERENDA REALE®

A little journey back in time: enjoy a Merenda Reale® in the historic cafés or inside Royal Residences, choosing a **cup of hot chocolate** or a “**Bicerin**” together with the irresistible traditional biscuits. (8)

MANGÉBIN

The circuit of restaurants offering **typical local cuisine** in Torino and its province. The goal is to promote regional cuisine while supporting the local economy.





EXPERIENCE

TOURS & ACTIVITIES

INCOMING OPERATORS NETWORK

A selected list of **incoming professionals** which offer customized packages and services, available all year-round.

NETWORK:

Tour Operators incoming, Service Providers, Hotel Consortia, Tourist transport suppliers

- Public-private partnership to boost the destination
- Strengthen the tourism offer and enhance the private sector
- Professional hospitality system and event support
- Use of *Turismo Torino e Provincia* brand

THANK YOU!
SEE YOU IN TORINO!





Destination Good Practice | Data practices, community engagement, and innovation

- Tim Fairhurst, ETOA; Prof Xavier Font, University of Surrey
- Barbara Jamison-Wood, London & Partners
- Marion Bordenave, Paris Je t'aime
- Veronica Rossi, Turismo, Torino e Provincia - winner 2025 European Capital of Smart Tourism
- Chantal Pastoors, The Hague Marketing Bureau



LIVE
from

The **Hague.**

◆ The City
The Partners
The **Hague.**

◆ The City
The Partners
The **Hague.**



1. Opportunity Identified

- ◆ **Spreading Quality Tourism to Strengthen Liveability**
- ◆ **Balance, seasonal peaks and visitor pressure**
- ◆ **The Hague = rich offer, accessible and under the radar**
- ◆ **Position as sustainable, high-quality alternative to busy cities**

2. Strategic Approach – Collaboration & Trade

- ◆ **City-wide strategy across tourism, culture, housing, mobility**
- ◆ **Strategic partners + Light Trade Package (for SMEs)**
- ◆ **Joint actions: FAM trips, trade fairs, shared storytelling**



3. Tactical Actions – Campaigns & Tools

- ◆ Big5 campaign in Amsterdam: Vermeer, Escher, Rembrandt, etc.
- ◆ Ruimtemonitor: live visitor flow tracking (city & coast)
- ◆ Sustainability: campaign with Deutsche Bahn & NBTC
- ◆ Binnenhof renovation: creative alternatives incl. visitor centre





4. Progress & Learnings

- What's working
 - ◆ Shift to shoulder season travel
 - ◆ Stronger trade partnerships
 - ◆ Cultural interest in The Hague growing
- Challenges:
 - ◆ Influencer ROI: now KPI-driven
 - ◆ Support needed for small trade partners

5. Impact on Priorities

- ◆ Working with Travel Trade = long-term investment
- ◆ Spreading in space & time stays top priority
- ◆ Scaling storytellers with partners
- ◆ Aligning campaigns with seasonal capacity
- ◆ 2026 focus: new boulevard Scheveningen & Kijkduin upgrades, and continuing to tell the Binnenhof story through creative alternatives





The City
The Beach
The **Hague.**



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Who we are

London & Partners is the business and destination agency for London.

We are a social enterprise, combining purpose with commercial rigour.

We are funded by grants, partners and our portfolio of venture businesses.



1969

2003

2011

NOW



Under the
National Tourism
Board (Visit
Britain)

Not much
investment or
London brand
recognition



London Brand
Awareness

Driver for MICE



London bid as a
drive to change the
perception of
London

Harness messaging
about venues, hotel
investment,
infrastructure



Integrated DMO -
merger with FDI
and Study London

Focus on the value
of business tourism
and the meetings
industry as drivers
of investment, jobs
and growth



Driver of strategy
and new events

Creating our own
events like
London Tech
Week and Ride
London

What we do

High Growth Business Support

We support international and domestic businesses in high-growth sectors to scale



Micro Business Support

We help small business owners to get the support they need to thrive.



Capital Investment

We bring global institutional capital to London to fund priority real estate, energy and infrastructure



Destination

We develop London as a destination and attract visitors and events



London Brand

We grow London's global reputation to support economic growth

Commercial & Partnerships

We create partnerships and profit-making ventures to scale our impact



London's growth sectors

Frontier innovation: London's next superpower



Financial, professional and business services & tech



Creative industries and technologies



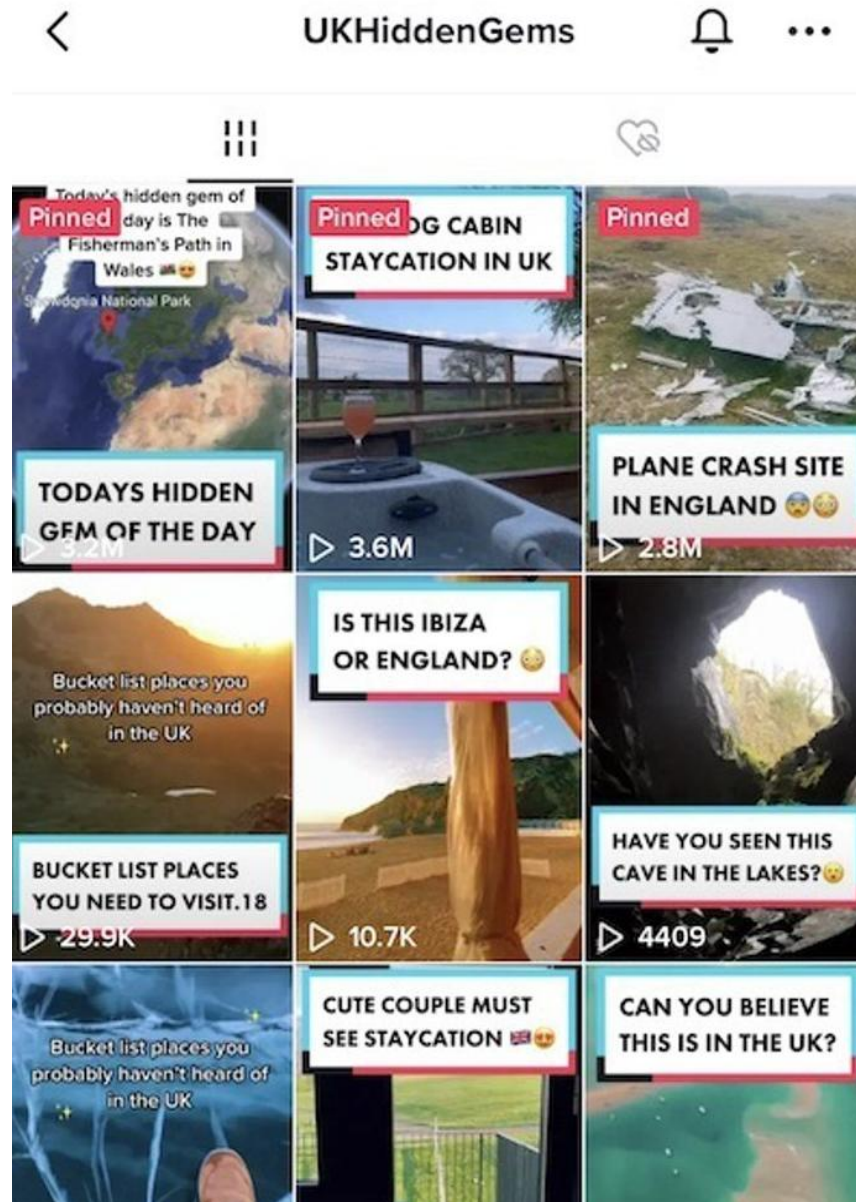
Experience economy



International education



TRAVEL IS NOW IN EXPERIENTIAL OVERDRIVE



Today's travellers navigate a world in flux:



Economic Constraints

Global leisure travel budgets are projected to grow by just 1%.

(Simon Kucher, 2024)



Shifting Demographics

42% of US underserved travellers feel limited by their identities when planning travel.

(Expedia, 2024)



Health Priorities

Wellness tourism reached \$830.2 billion in 2023 and is expected to grow 10%+ by 2028.

(Global Wellness Institute, 2024)



Digital Influence

92% of young travellers' last trips were motivated in some way by social media.

(McKinsey, 2024)



Climate Concerns

55% of global travellers checked the sustainability of the accommodation on their last holiday – up from 22% last year.

(Mariott, 2024)

Three key shifts in consumer travel



Travel goes niche

Travel experiences are becoming niche, with consumers seeking novelty, uniqueness and authenticity.



Travel gets conscious

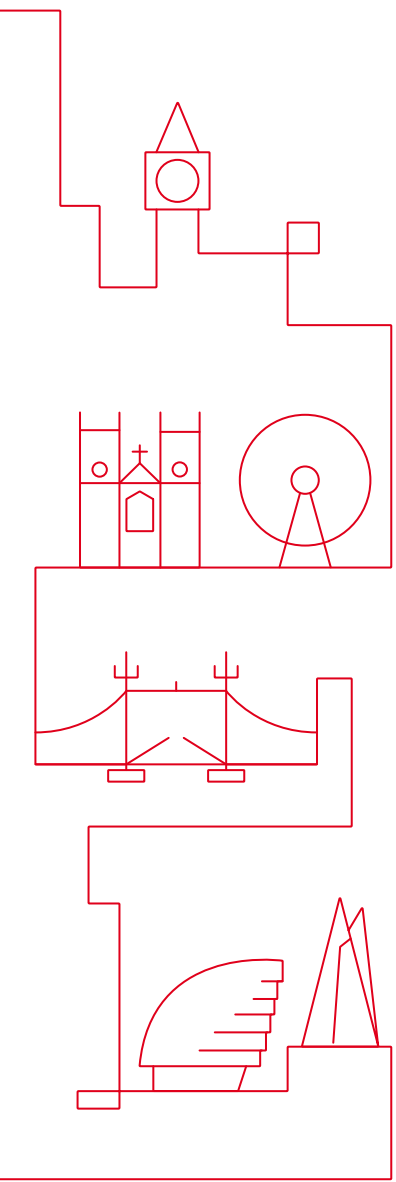
Consumers grow conscious and intentional of their travel habits, exploring options around wellness and sustainability.



Travel becomes flexible

Travel is hyper-personalised and flexible to meet the needs of ever-changing lifestyles, work rhythms and consumer identities.

Let's get you thinking...



Who are the
thought leaders on
local London culture
and history that you
can partner with?

What subcultures
and fandoms can
you leverage for
events and
itineraries?

What are the hyper-
local stories and
traditions that can
spotlight London's
rich history?

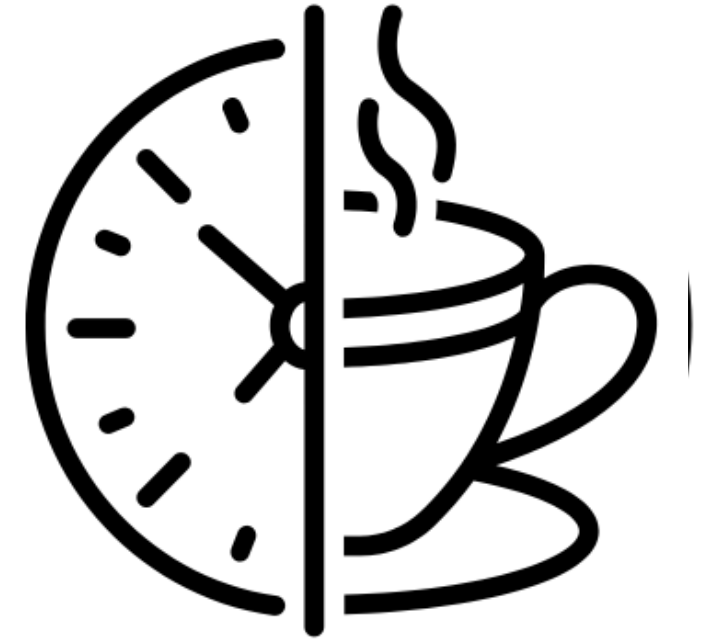


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Networking Break

... See you at 16.30





Operators Panel Product Development | Good Practice - Scalable Solutions and Products

- Tom Jenkins, ETOA
- John Owen, Context Travel
- Luke Petherbridge, ABTA
- Shirley Sin, G2 Travel

ETOA

Thank you – let's PARTY!

