

# ETOA Briefing & Insights



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**President**  
**ETOA**



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# ETOA Insights

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**President**  
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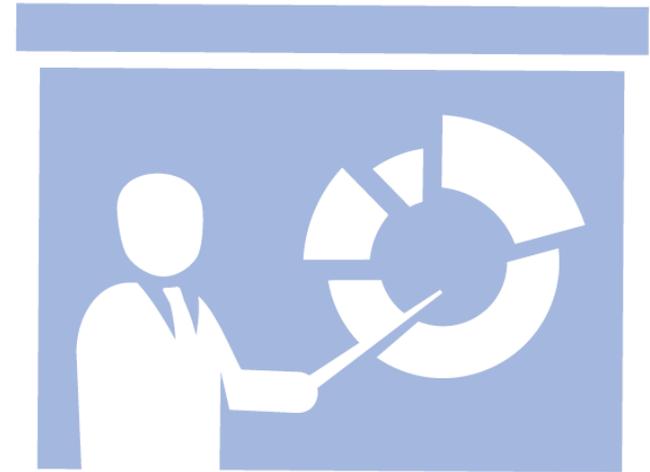
# Better Tourism in Europe



**Making your voice heard on  
a European, national and  
local level**



**Networking and  
business development  
opportunities**



**Actionable information, insight  
and research supporting your  
business**

# The Power of our Community



**1000+**

Members  
in ETOA



**700+**

Supplier &  
destination members



**100+**

New members  
in 2025



**260+**

Buyer  
members

**ETOA**

BETTER TOURISM IN EUROPE

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**30k**

Tourism professionals  
in our database



**27k+**

LinkedIn  
followers

# Events that Connect



**49k+**  
Meetings held



**2500+**  
Attendees at our B2B events



**400+**  
Attendees at our socials

## FOCUS ON EUROPE



In person  
London



In person  
Copenhagen



In person  
London



In person  
London



Online

## SOURCE MARKETS



Online



Online &  
India



Online &  
China



Online &  
Japan



Online



Check all  
ETOA  
events

# SHOP

Shoulder  
& Off-peak

NE  
W

## SHOP Shoulder & Off-peak

12 June 2026 | London

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- One-day B2B event
- Insights & webinars on demand

Focus on:

- Driving demand beyond the high season
  - Exploring the unique
  - Providing better experiences
  - Supporting a balanced tourism economy
- 

Find out more:  
[etoa.org/shop](https://etoa.org/shop)

In partnership with:

**CITY  
DESTINATIONS  
ALLIANCE**

**EUROPEAN  
TRAVEL  
COMMISSION**



February  
2026



March  
2026

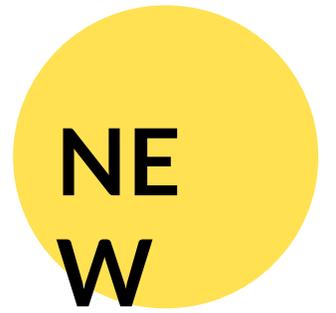


May  
2026



September  
2026

# Showcase Outbound



Month-long initiatives dedicated to strengthening ties between European tourism and long-haul source markets.

Include **online insight sessions** and **expert-led webinars**, alongside online and in-person **networking opportunities**.



NETWORKING



INSIGHTS



VISIBILITY

# Insight & Influence



**40+**  
Webinars  
in 2025



**3450+**  
Webinar  
registrations



**70+**  
Insight  
posts

# Climate Action & Collaboration

## Sustainability Hub

Practical information,  
member offers and resources

[MORE FROM ETOA](#)



ETOA's community can help shape tourism practices and products across Europe and its source markets, influencing the long-term strength of the industry. A growing industry of specialist providers are supporting this shift, but we understand that not every solution works for everyone.

This hub is here to help busy professionals stay informed, understand what's driving change, explore options that could work for their organisation, and find support for putting them into action. We welcome your comments and contributions.

## Sustainability Resources



Members



August 25, 2025

### TerraVerde on Financial Risk Disclosure in California

TerraVerde on potential duties on business to disclose climate-related financial risk from 2026 under Californian state regulation.

[MORE](#)

Members



August 4, 2025

### Carbon Neutral Coach Tours: Operational Challenges and Scalability

Case study from Leisuretime by Toureasy: "We set out to become the UK's first carbon neutral coach tour operator - accessible, affordable, and inspiring change across the industry. From measuring full holiday emissions to trialling HVO fuel, we're learning, adapting, and pushing forward, despite challenges, to make carbon neutral travel part of mainstream tourism."

[MORE](#)

Members



July 22, 2025

### Cost Savings: Transforming our Housekeeping Operations

A case study by Millennium Hotels and Resorts: "We introduced a guest-facing room cleaning program that allows visitors to choose their desired level of housekeeping. This initiative reduced environmental impact and improved operational efficiency, without compromising the guest experience. It forms a replicable, low-cost solution aligned with our broader sustainability goals and emissions reduction commitments."

[MORE](#)

Members



July 18, 2025

### ETC | Climate Action Roadmap for National Tourism Organisations

A detailed climate action planning framework by the European Travel Commission to support NTOs looking to create climate action plans.

# ETOA at the Heart of European Tourism



# Why ETOA Matters



# Death & Taxes

**Tom Jenkins**  
**CEO**  
**ETOA**



# Future Past - imperfect

**1990**

**“no more travel agents or tour operators by year 2000”**

**1992**

**“so many Chinese in Europe there will be no room for anyone else”**

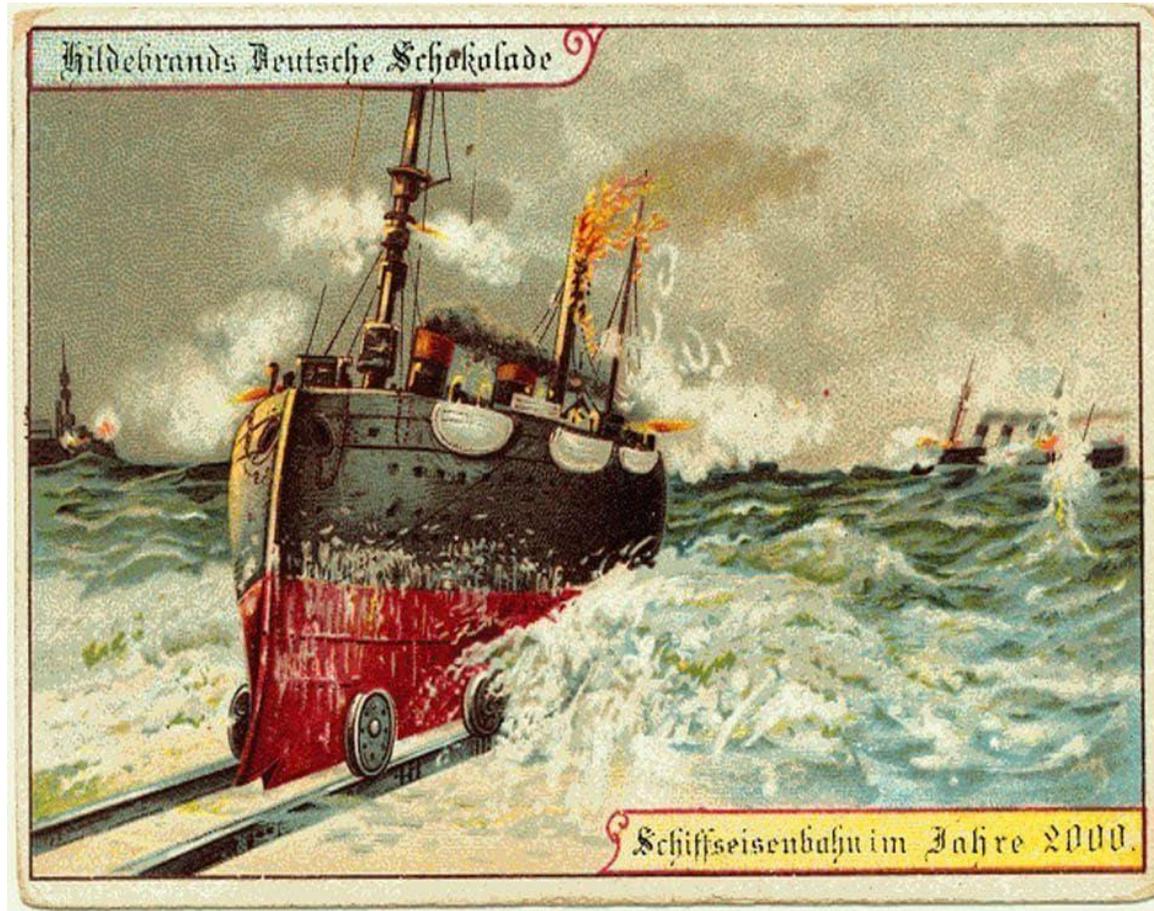
**2000**

**“online reservations through Hotel websites will wipe out OTA’s and Bedbanks”**

**2002**

**“algorithms will mean that hotel managers will be no more responsible for sales and occupancy than Airline pilots are for ticket sales”**

# Predictions are largely fantasy



**How coal burning ship  
functions underwater not  
explained**

# Predictions are largely fantasy



- **Underwater Sightseeing Tour**
- **Ocean going pedlo/bicycle/bath chair**

# Predictions are largely fantasy



- **Correct**
- **We have self check-in**
  - **But 50 years later**

# Predictions are largely fantasy



- VTOL “aerial sedan”
- Ready for 1967

# Predictions are largely fantasy

All possible, but share

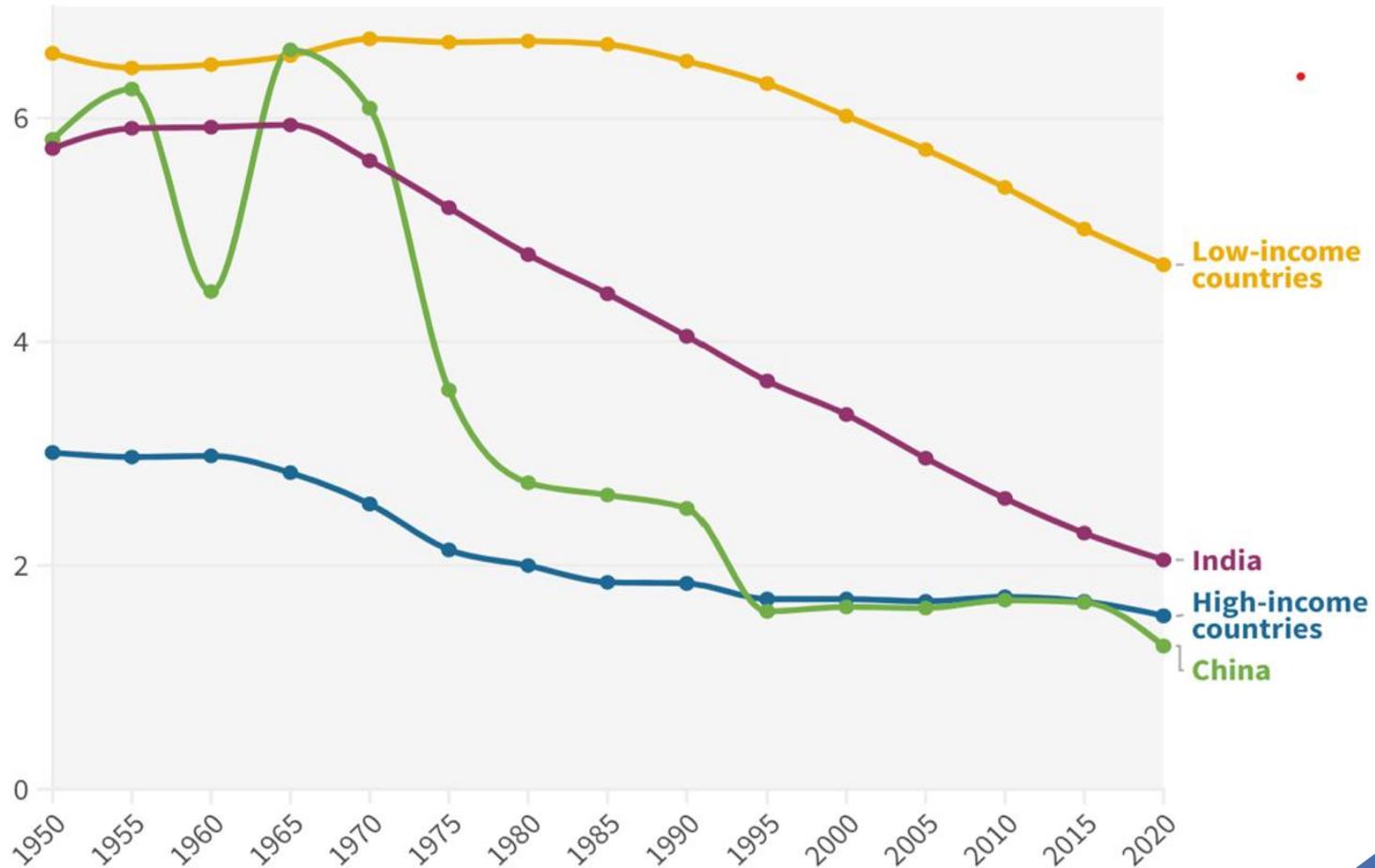
- hope that future will solve the manifest impracticality
- assume that consumers appetite for novelty will overcome cost
- hopelessly awry in terms of timescale

# Be very wary of predictions

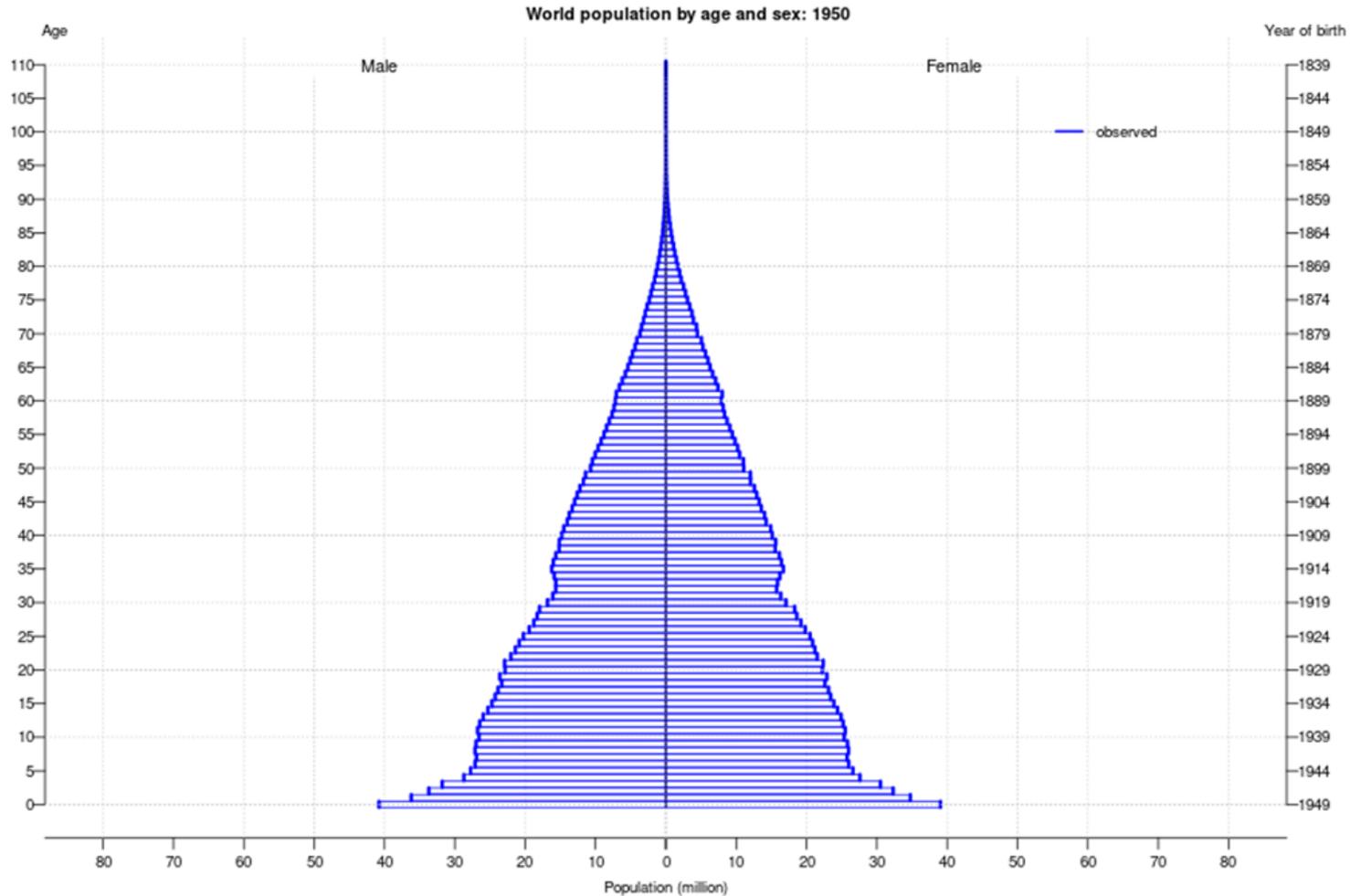
- That ignore
  - Practicality
  - Cost
  - Consumers
  - Time
- Mix of desire (or its cousin fear) with possible conquers the probable

# Replacement Rate 2.1?

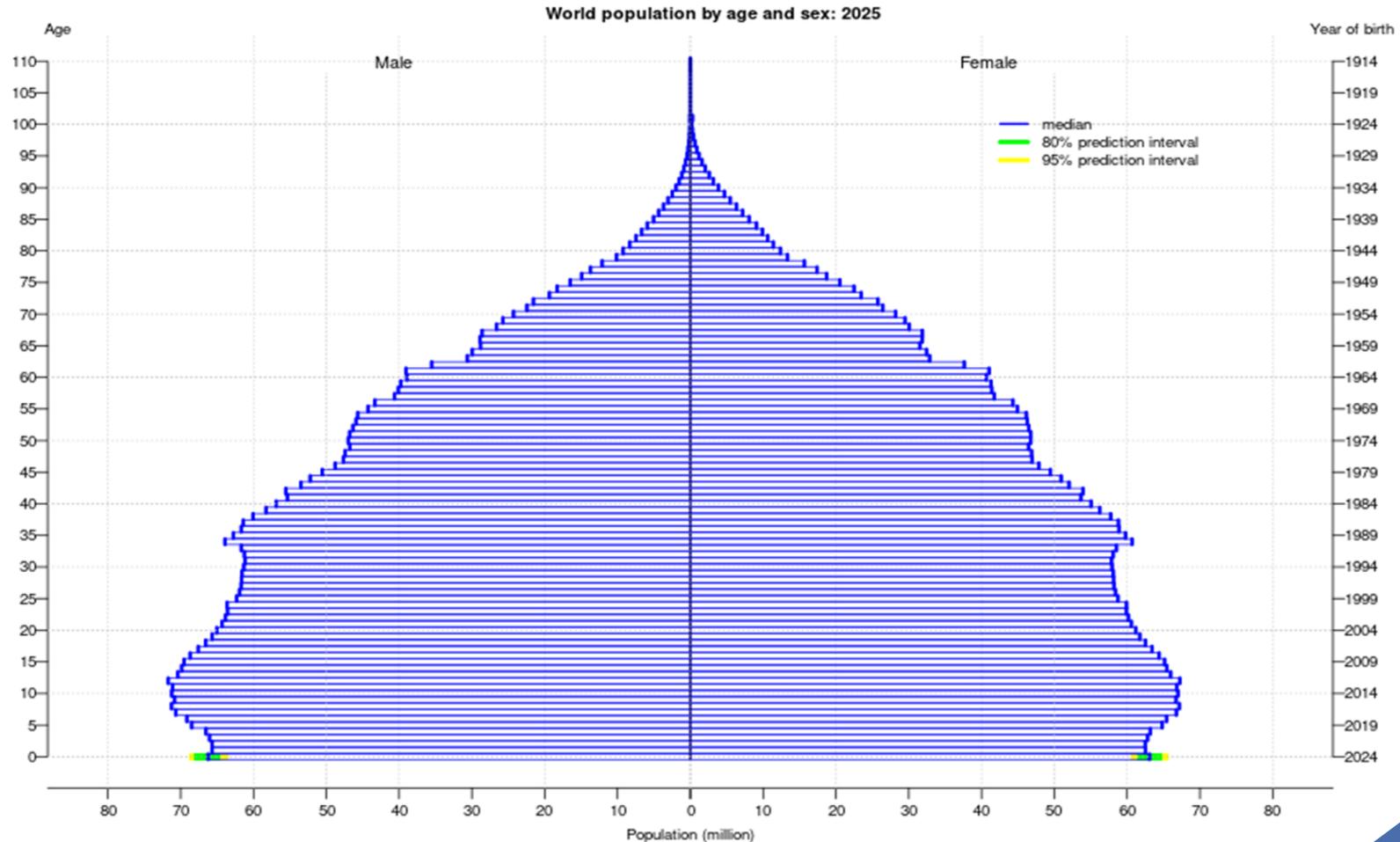
Total Fertility Rate by Year



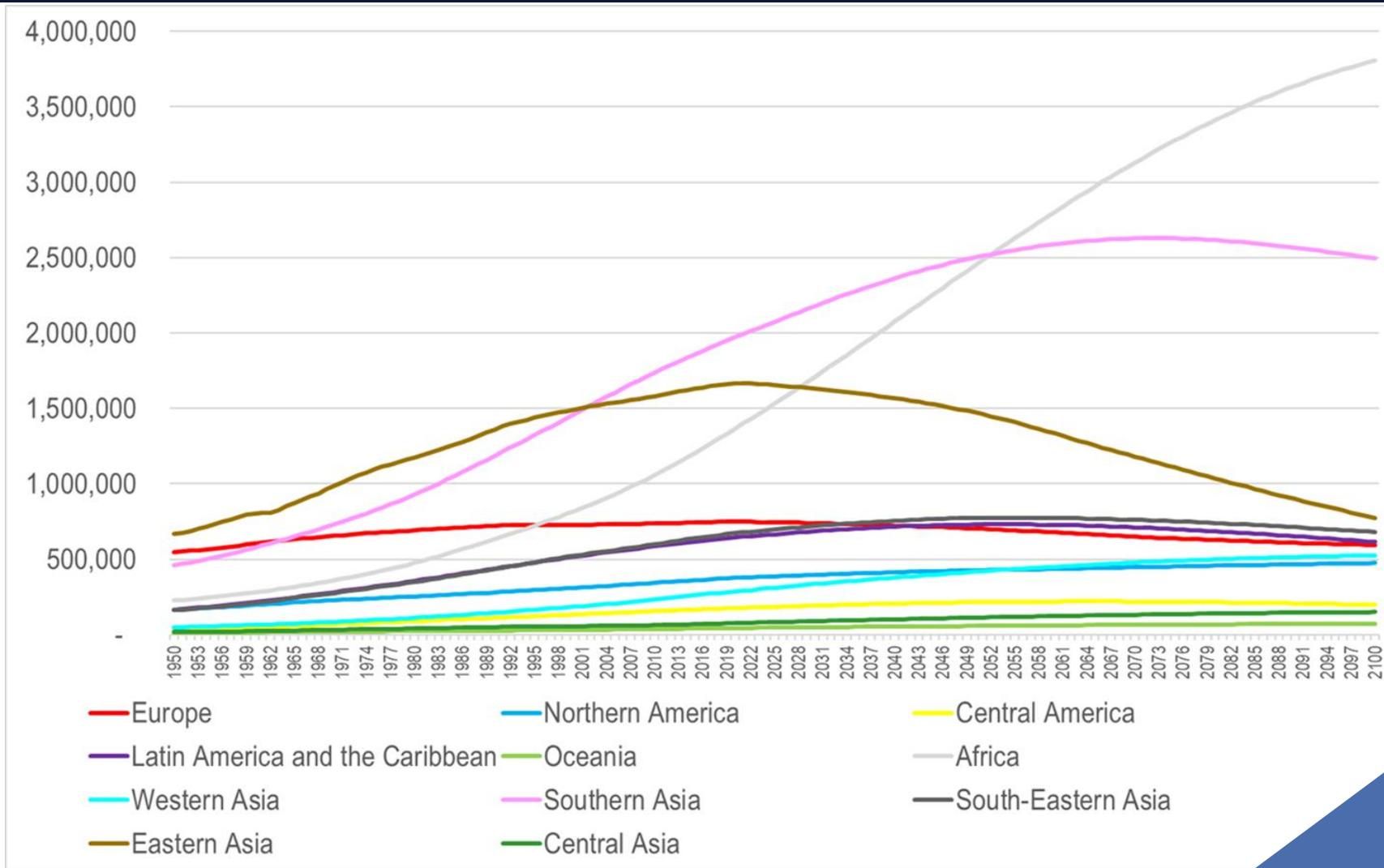
# World Population Pyramid - 1960



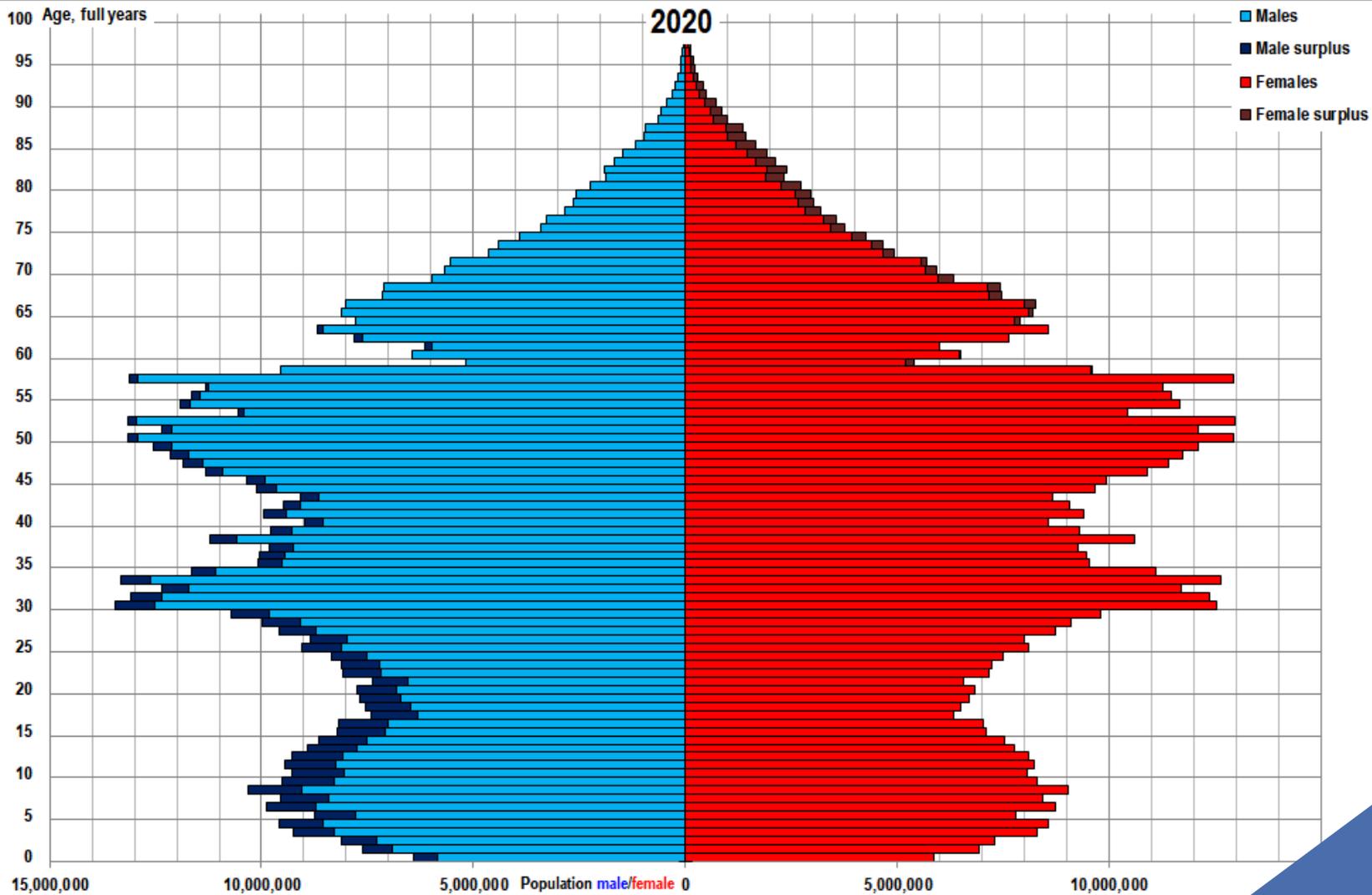
# World Population 2025



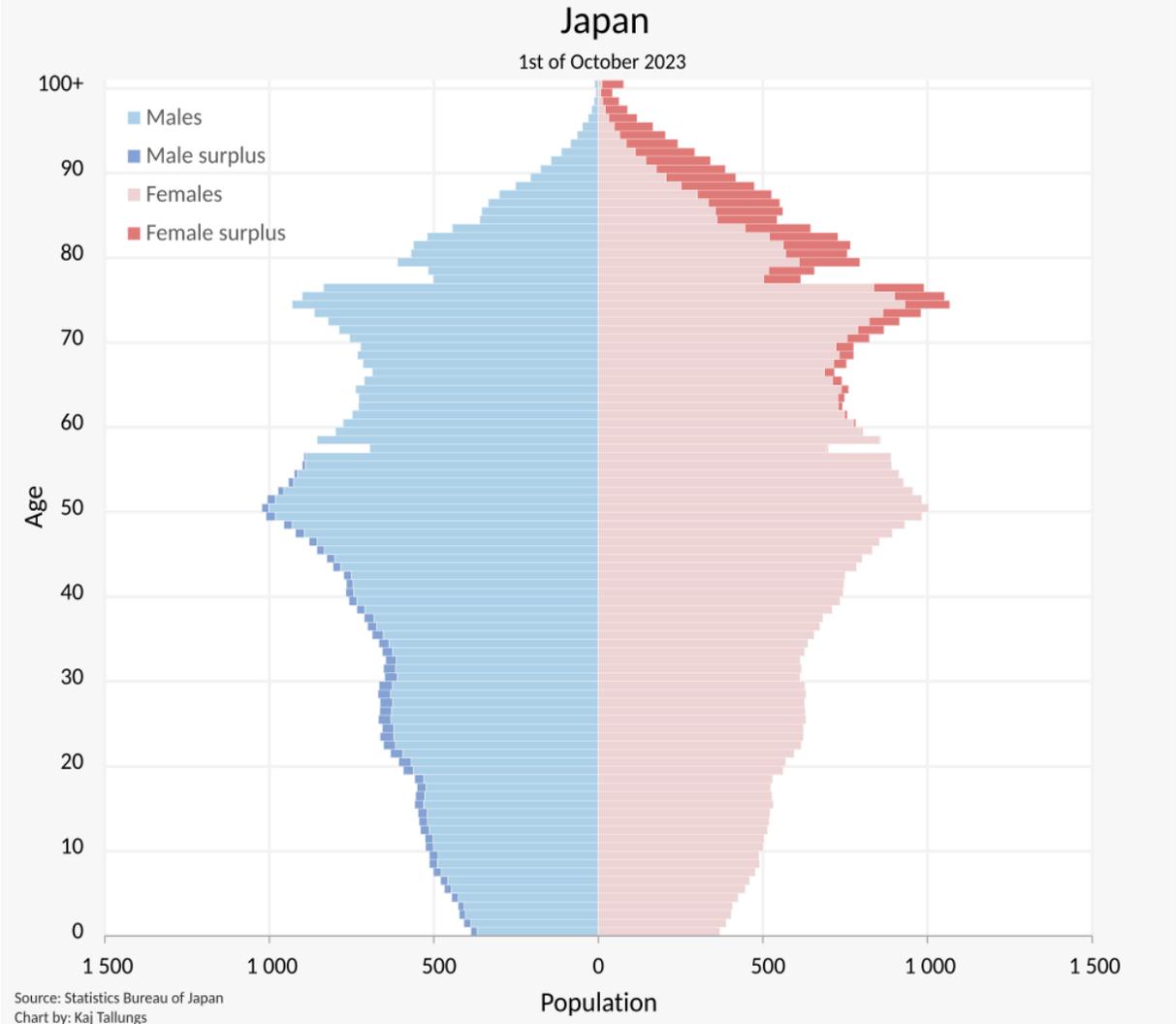
By 2100 there will be fewer people in Europe and Eastern Asia than in 1960;  
Africa will account for 37% of global population, up from 9% in 1950



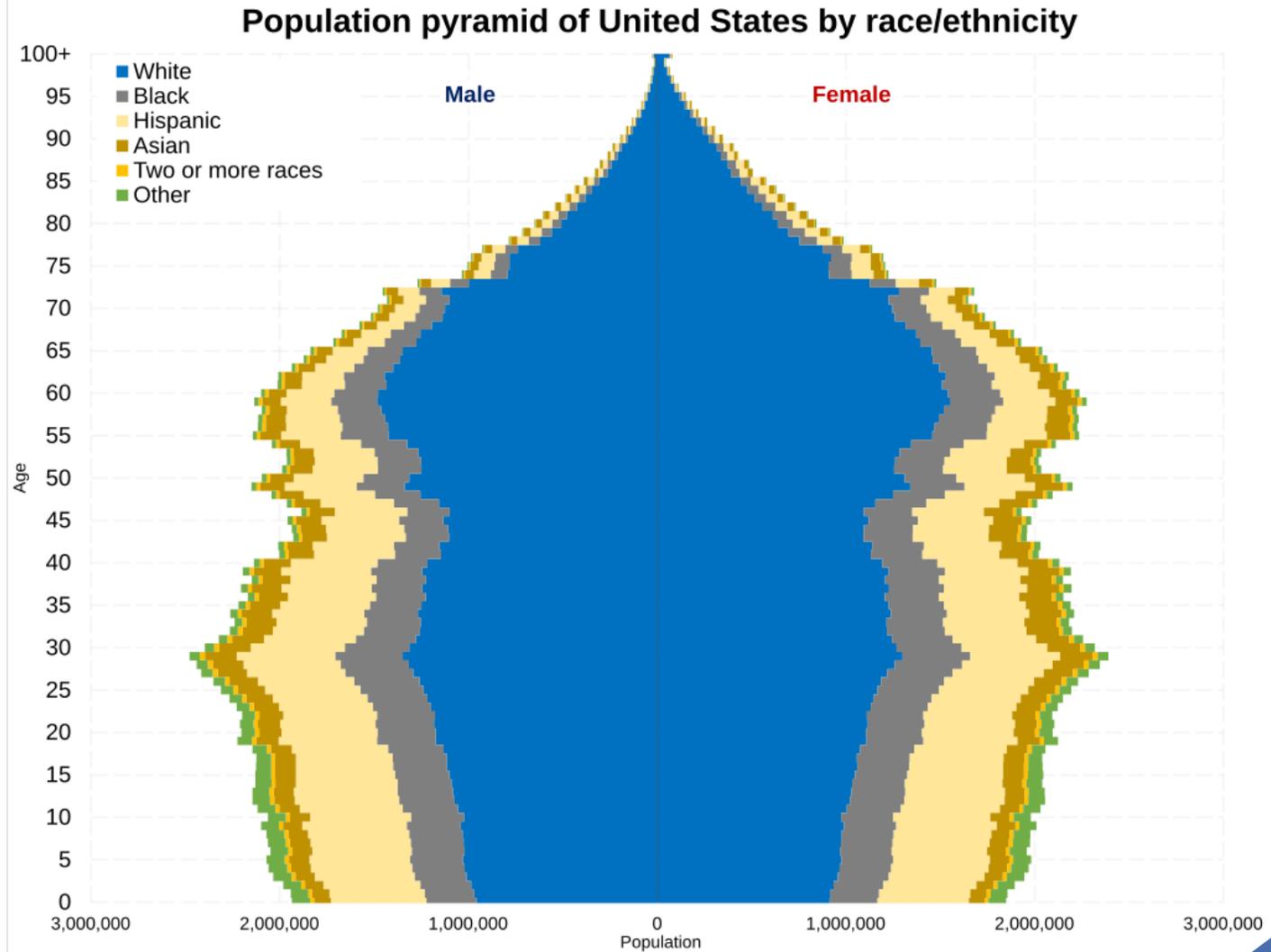
# China 2020



# Japan 2025



# USA 2025



# Huge change in Society

## Proportion of population over 65

		2000		2030
China		13%		18%
USA		13%		20%
Japan		7%		33%

# Challenge for Europe

Over 65's

- Have money
- Have time

But c 40% will have some form of disability

- #1 Mobility
- #2 Respiratory fatigue

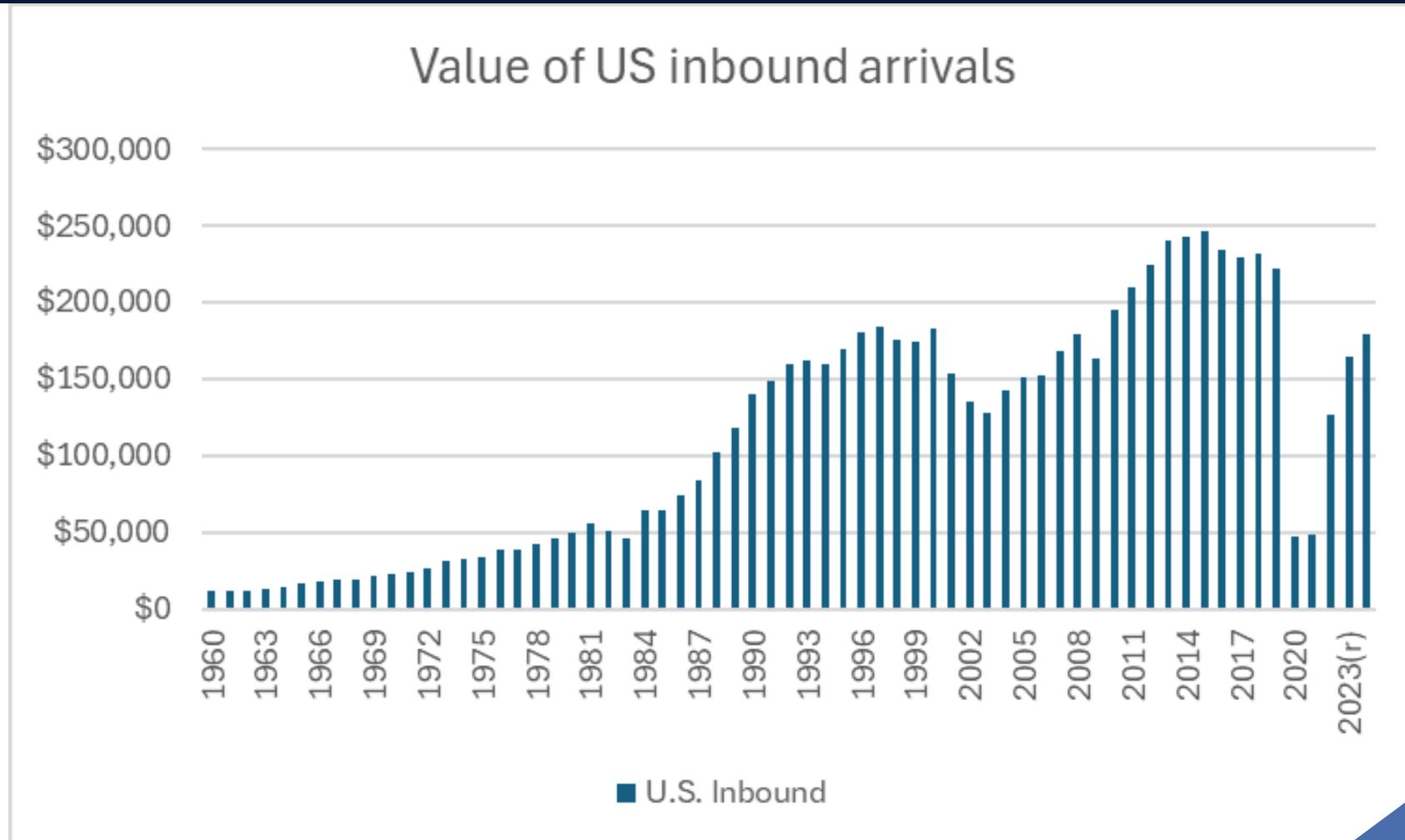
How can we adapt?

# What will we sell?

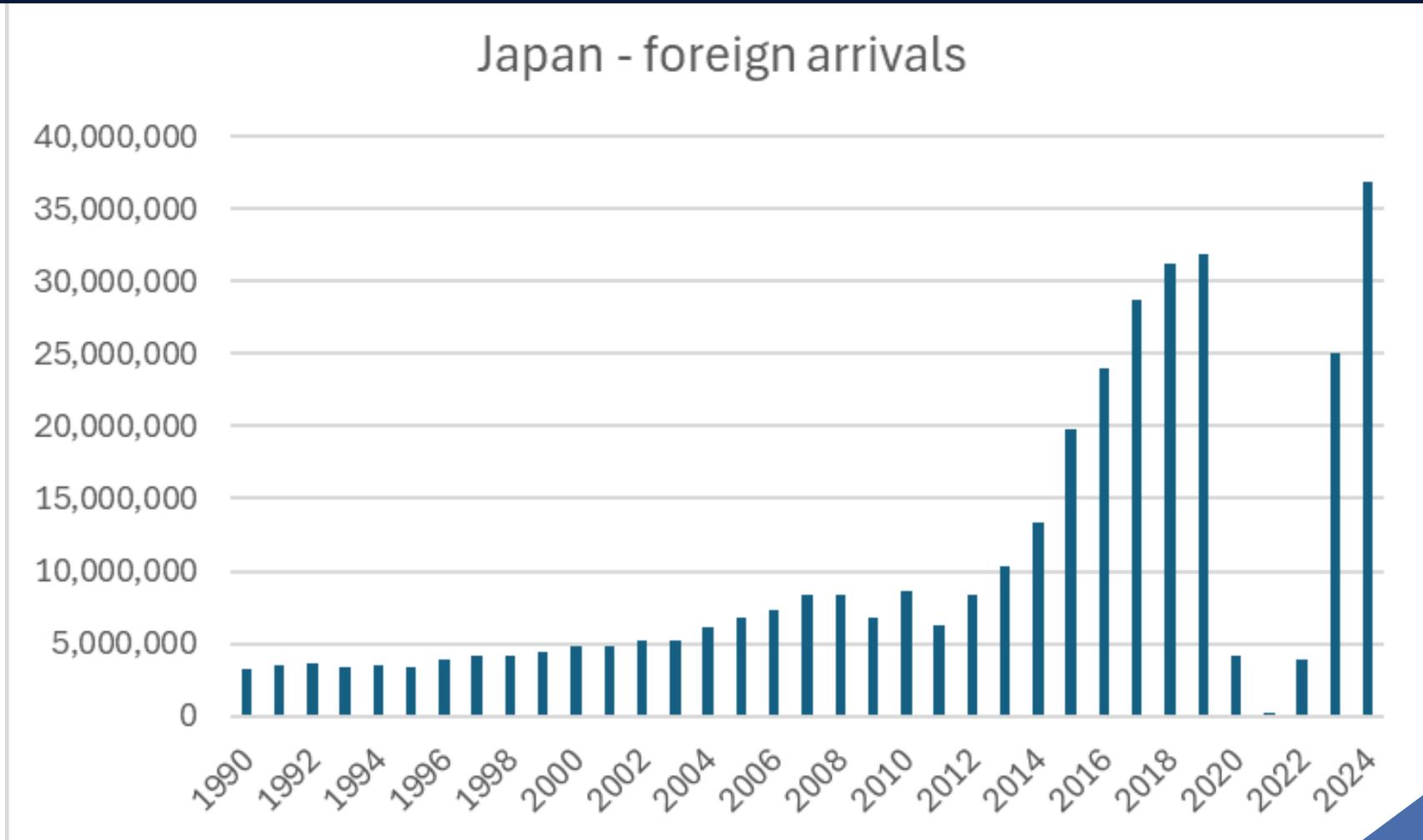
## What we always sell

- Taste of the inhabitants
  - Manifested in the Culture of the Destination
  - Delivered through the Service economy

# If the price is right #1



# If the price is right #2



# If the price is wrong?

Netherlands imposing a VAT on Hotels of 21% (from 9%)

- Plus Amsterdam city tax of 12.5%

Edinburgh has VAT of 20%

- Plus City tax of 5% (adding 6% incl. VAT)

Between a third and a quarter of spend does not reach hotel

# If the price is wrong?

Tax not paid by tourists

- they pay what they choose

Paid by the hotels that cater to tourists

- major squeeze on margin

# If the price is wrong?

ABM Amro launched a stinging attack on hotel pricing in Netherlands, predicting a shortfall in tourism spend outstripping any increased income

“Buckaroo” moment – where the industry cannot take any more

# Tourism tax

Tourism taxes impose tariffs on money flowing in

- a tax on Exports

Make Liberation Day Tariffs looks intelligent

Driven locally by cash hungry councils

- once imposed, they are difficult to remove

# VAT

Reform of TOMS emphatically on agenda

Hitherto non-EU operators have avoided exposure by being outside the EU

This flies against principal of VAT being paid by the consumer on services enjoyed within the EU

But were it to be imposed, it would a tax on the process of exporting Europe, imposed on costs incurred outside the EU

European  
Travel  
Marketplace  
**Asia-Pacific**

# Asia-Pacific contracting Europe

25 Nov 2025 | Online

- Direct contact details of all attending delegates
- Add to your other ETOA event attendances for only €475
- Substantial cost and time savings on travel and exhibition fees

Find out more: [etoa.org/etm-asia](https://etoa.org/etm-asia)

In partnership with:



Visit  
**PARIS  
REGION**



**TOSCANA**  
PROMOZIONE TURISTICA

# The Marketplace for tourism experiences off the beaten tack

18 Nov 2025 | Online

- Direct contact details of all attending delegates
- Attendance for only €595
- Substantial cost and time savings on travel and exhibition fees

Find out more:

[www.etoa.org/adventure-europe](http://www.etoa.org/adventure-europe)



**ADVENTURE  
EUROPE**

In partnership with:



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Global European  
Marketplace

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**ZEERO GROUP**



 **TOURPLAN**



**BLENHEIM PALACE**

**LE GRAND**

**MaCher**



**Stadium Tours  
and Experiences**

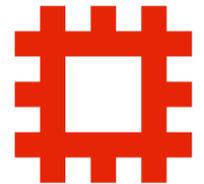


**GEM**

Global European  
Marketplace

# WEEKEND PROGRAMME PARTNERS

**GO CITY**

 **English  
Heritage**

 **THE BICESTER  
COLLECTION**

***Hard Rock***

   
**GoldenTours**  
Experience London and the UK

**Mamuška!**  
Southbank Waterloo

 **Westminster  
Abbey**

**Moco**  
MUSEUM



**GETTING INVOLVED WITH**

**ETOA**



## GET INVOLVED WITH THE COMMUNITY

- Strategic working groups
- Destination focused working groups
- Origin market interest groups
- Speaking opportunities (webinars, conferences)
- Insight Hub publications
- Sustainability community
- Operations LinkedIn group
- Talking heads, videos and testimonials
- Sponsorship and partnerships
- AC / Board

Scan the QR code for more information about working groups



# ADVISORY COUNCIL

## WHAT WE DO

- Actively participate in promoting and strengthening ETOA to better tourism in Europe.
- Advise the Executive Board
- Act as a representative voice of ETOA membership



# ADVISORY COUNCIL EXPECTATIONS

- Meet minimum 4 times a year
- Attendance is expected; in-person required for at least 2 meetings
- Usually Brussels, London and at least one country-sponsored destination
- Serve a minimum of 2 years
- Participation in relevant working groups
- Attendance at and active engagement in ETOA events and activities
- Ad hoc consultation



# ADVISORY COUNCIL PROCESS EXPECTATIONS

- 2-3 New AC Members Sought
- Preference for **Rail/Coach transport, DMO/Tourism Board and Hotel** members
- Outreach to AC members a plus



# ADVISORY COUNCIL APPLICATION TIMELINE



Join us for the upcoming webinar 17<sup>th</sup> Nov:

