



EUROPEAN TOURISM ASSOCIATION

# LOOKING AHEAD TO 2024

## MAKING MEMBERSHIP COUNT

### PRESIDENT'S MESSAGE

Never has there been a more exciting or valuable time to be part of ETOA. Following the pandemic, tourism is thriving, and our future is sparkling; global tourism will represent a US\$15.5 trillion economy by 2033, according to the WTTC. But all is not rosy!

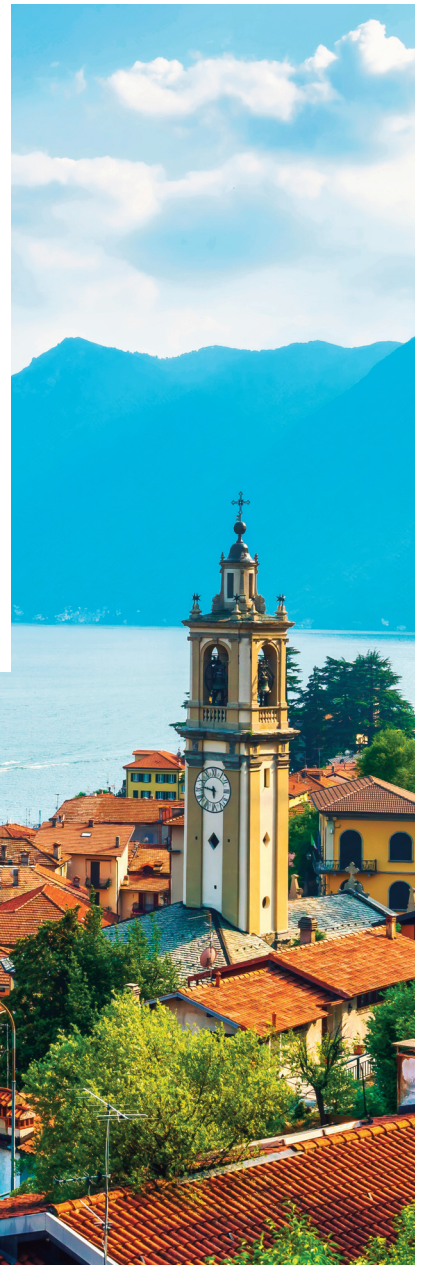
With growth comes regulatory focus on over-tourism and demands for sustainability. Once again, we find tourism in general and group tourism in particular under fire. ETOA is here to help. ETOA's work to navigate our members through issues such as new operational requirements, city access, visa and tax policy, and human capital development is essential to growth and – for



some members survival. As President of US-based Tauck and an ETOA member for more than two decades, I can attest that ETOA's actions are simply essential to our continued success on our most visited continent.

Our industry is powered by people. ETOA's team and its members prove we are stronger together. Members of ETOA can make their membership count, share their voice and ensure European tourism's recovery is responsible and robust. We will always be stronger together!

**Jennifer Tombaugh**  
ETOA President







# MAKE THE MOST OF THE ASSOCIATION IN 2024

MEMBERS OF ETOA ARE PART OF A GROWING AND VIBRANT COMMUNITY OF TOURISM PROFESSIONALS WHOSE ORGANISATIONS BRING MILLIONS OF TOURISTS TO EUROPE EVERY YEAR.

Membership provides **direct access to 375+ buyers and 760+ suppliers and destinations**, representing a huge variety of products and activities across Europe.


Since 2021 over **370 new members** have joined the association, ensuring there is always a vibrant mix of new and familiar contacts to connect with.







# MEMBERSHIP IN NUMBERS

 **191**  
New members  
in 2023

 **376**  
Buyer  
members

 **769**  
Supplier and  
destination members

 **65**  
Global and European  
source markets

 **20k+**  
Tourism professionals in  
our database

 **6k+**  
Member  
contacts

 **1800+**  
Decision  
Makers

 **23k**  
LinkedIn  
followers

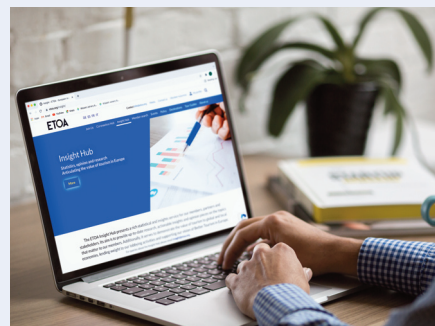


# MEMBER BENEFITS IN 2024



## ACCESS & NETWORKING

- Expand your network with direct **24/7 access** to qualified contacts that want to do business with you, including tour operators, wholesalers, OTAs, hotels, attractions, destinations, DMCs and transportation partners across Europe.
- Build stronger relationships when you attend **ETOA B2B workshops** networking events.
- Meet the people you want to meet through member-only preferential appointment selection at ETOA events\*.
- For buyers: cut costs by taking advantage of our hosted buyer programme at selected ETOA events.
- Exclusive access to the largest B2B workshop of the year, **The Global European Marketplace**.
- Support and recognise your tour guides/directors through ETOA's **Tour Guide ID Card** programme.



## INFLUENCE

- Make your voice heard through working groups and other member-only forums to address operational problems and influence the future of European tourism.
- Have your say in future regulation through your support for **ETOA's dedicated policy work**.



## PROFILE

- Make it easier for other members to find you through **ETOA's member search portal**.
- Save money and get noticed by exhibiting with ETOA at WTM London and ITB Berlin.
- Increase awareness for your brand through **promotional and sponsorship opportunities** at ETOA events and beyond.



## INSIGHT

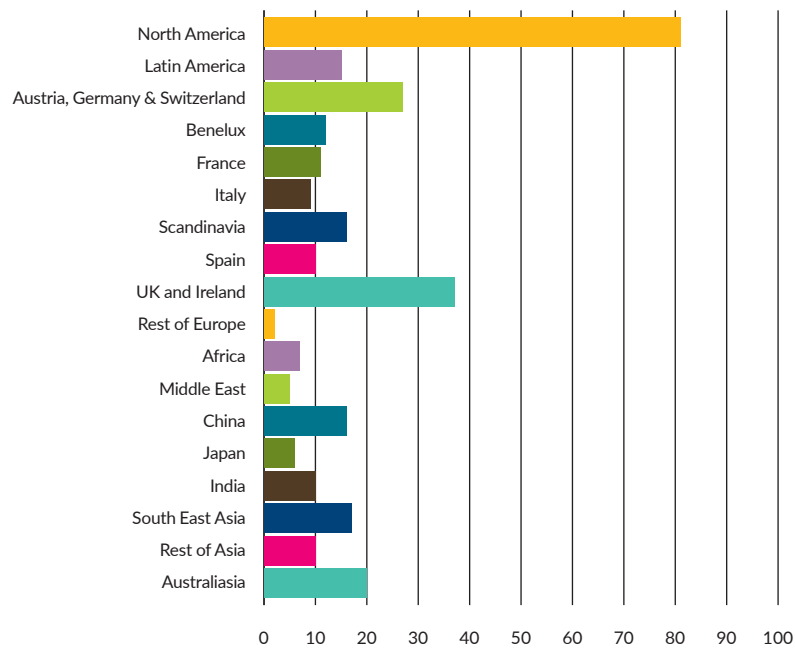
- Be the first to know by joining our member-only **webinars and briefings** on topical issues that impact you.
- Explore **data and research** that helps you make better decisions.
- Access member-only discounts and research tools available through **our partners** to deliver insight designed specifically for your business.

\* Excludes GEM and BIM





## SOURCE MARKETS OUR BUYERS REPRESENT (%)

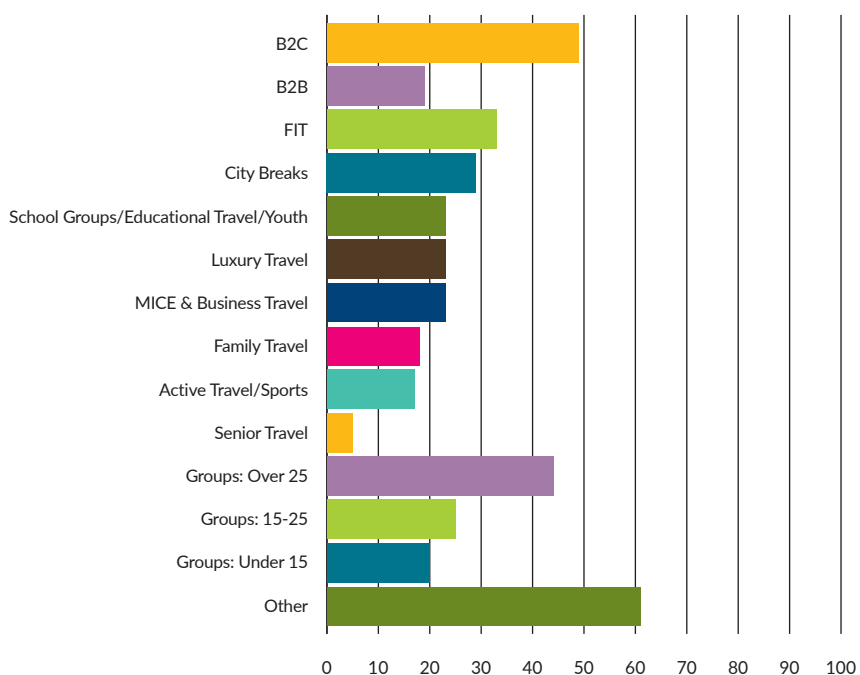


## SUPPLIER AND DESTINATION MEMBERS



- Ground Handlers/Local Tour Operators/DMCs
- Visitor Attractions & Ticketing Services
- Hotel/Accommodation Services
- Destinations
- Transport Services/Cruise and Rail Excursions
- Travel Technology/Digital Services & Consultancies
- Folklore shows/Restaurants/Cabarets/Shops /Cultural demonstrations

## WHAT OUR BUYER MEMBERS OFFER (%)



## WHERE ARE THEY BASED



- United Kingdom & Ireland
- Austria, Germany & Switzerland
- Scandinavia & the Baltics
- Benelux
- Italy & Malta
- France
- Spain & Portugal
- Adriatic & Greater Balkans
- Other



# STRENGTHENING YOUR NETWORK

IN 2024, ETOA WILL OFFER MORE OPPORTUNITIES THAN EVER BEFORE TO GET FACE TO FACE WITH OTHER MEMBERS.



## ETOA Socials

Since 2022 we have held social receptions for our members and partners in

**Amsterdam, Belfast, Brussels, Dublin, Houston, London, Milan, Paris, Rome and Rotterdam.** In 2024 we will continue to bring our members together on an informal basis.



## B2B workshops

Over the next 12 months ETOA's eight B2B workshops will give you unparalleled

networking and contracting opportunities. Our workshop events are offered online and face-to-face, driven by our powerful appointment matching system, helping you make the right connections.



Buyers  
always attend  
for FREE

All our in-person  
B2B workshops  
include informal  
networking  
receptions

Suppliers and  
destination  
members get  
discounts  
of up to 50%  
on events.

## ETOA B2B WORKSHOPS



In partnership with



NORDIC TOURISM  
COLLECTIVE

**20 February 2024**

**Copenhagen, Denmark**

Connecting Nordic and Baltic suppliers and destinations with international buyers, the 5th edition of The Nordic Marketplace will be the largest to date.

European  
Travel  
Marketplace  
North America

**29 February 2024**

**Online**

Dedicated to tour operators and travel buyers from North America who are looking to contract with European tourism service providers.



In partnership with

CITY  
DESTINATIONS  
ALLIANCE

**8-9 April 2024**

**London, UK**

This two-day event mixes a commercial foundation with an engaging exchange of product development and operational debate.

European  
Travel  
Marketplace  
Asia-Pacific

**10 September 2024**

**Online**

Dedicated to tour operators and travel buyers from **Asia and the Pacific** who are looking to contract with European tourism service providers.

2024  
The  
Global  
European  
Marketplace

**31 October-1 November 2024**

**London, UK**

ETOA's flagship high-level contracting event with over 800 members attending.

**GEM is a member-only event.**

BIM  
Britain & Ireland  
Marketplace

**31 January 2025**

**London, UK**

BIM is the main contracting event for British and Irish tourism providers and destinations, connecting them with international buyers.





“ Thank you so much – what a great event. It was so lovely to see and speak to everyone again and interesting to get all of the updates. Coordination and timing was perfect; all communication in advance of the event was timely, clear and user friendly too.

Merlin Entertainments Ltd

“ BIM is a great event with an opportunity to meet 25+ buyers in a single day very efficiently. I will be attending this event for the foreseeable future.

Killary Fjord Boat Tours

“ Great event and opportunity to meet European and UK suppliers and partners. Thank you for a brilliant event!

ECE Travel Ltd

“ It was a pleasure to meet existing and possible new partners during this event! Well organized and really good appointments with a lot of potential!

Roomz Hotels



24 May 2024  
Shanghai, China  
ETOA is back in Shanghai with this efficient B2B event connecting dedicated Chinese buyers with European suppliers and destinations.





# OPERATING IN EUROPE – MAKING YOUR VOICE HEARD

THE MORE MEMBERS WE HAVE, THE MORE ATTENTION WE GET. THE SCALE AND DIVERSITY OF OUR MEMBERSHIP MEANS WE HAVE A DISTINCT AND CREDIBLE VOICE WITH POLICYMAKERS.

ETOA membership helps fund our work with regulators and legislators to keep Europe 'open for business'. Operational challenges with availability and ticketing of attractions, city access restrictions and overnight taxes are growing. New proposals to change EU law affecting the sector are imminent:

- A new **indirect taxation package** including the future of the tour operators margin scheme.

- Revised proposals for **package travel** and passenger rights that could radically affect risk management and pre-payments.

New European border formalities, **EES** and **ETIAS**, will be introduced. On improved visa facilitation, while the EU has committed to more digitalisation, the planned progress is slow.



It is not just talk: without coordinated and focused effort by ETOA and its partners, Germany might have started to tax consumer sales outside EU of German tourism product.

## GET THE INFORMATION YOU NEED

Helping members solve problems and find new options, **ETOA's website** is a hub for actionable information and practical insights. Some of the key areas we are active in on their behalf are:

- City access restrictions
- Visa and borders
- Tourism Taxes
- Guiding regulation

To find out what we do to support our members, or to get involved with any of ETOA's work on the business environment for tourism, please contact: [policy@etoa.org](mailto:policy@etoa.org)





## ORGANISATIONS WE ARE PART OF ON OUR MEMBERS' BEHALF

Our influence is best illustrated by the bodies that we have been asked to join or lead.



### Together for EU Tourism

We were selected to join the new Expert Group supporting the European Commission's initiative whose function is to monitor the roll-out of the EC's strategic plan for tourism in 2030.



### Sustainability and Climate Action

Product development and diversification is supported by ETOA's in-house event expertise and destination engagement. To speed up progress with our **climate action** we partnered with Greentripper in 2023 to support our ETOA's efforts to measure and mitigate our emissions.

On the 23rd November, together with ECTAA, we held our first B2B workshop focusing solely on more sustainable products and offers.



### Tourism Manifesto

ETOA is Co-Chair of this alliance representing public and private sector organisations. With 2024 elections in mind, we will be working to build consensus on key policy priorities and obstacles to success. For more information visit: [tourismmanifesto.eu](https://tourismmanifesto.eu)







## ETOA PARTNER ORGANISATIONS

EUROPEAN TRAVEL  
COMMISSION (ETC)

UNITED STATES  
TOUR OPERATORS  
ASSOCIATION (USTOA)

CANADIAN  
ASSOCIATION OF TOUR  
OPERATORS (CATO)

“ ETC was founded to strengthen the sustainable development of Europe as a tourist destination and to increase competitiveness in its source markets worldwide. ETOA remains one of our most valued partners in Brussels on the policy agenda and overseas where we’re working together in China and Japan as Asia outbound returns, as well as in North America.

Eduardo Santander  
Executive Director and CEO, European  
Travel Commission; Co-Chair, European  
Tourism Manifesto; ETOA Advisory  
Committee member

“ 16 of the top 20 destination countries for our members are in Europe: we need to know what’s going on. ETOA’s connections, expertise and advocacy help to keep us informed, ensure the value of the US market is understood, and that issues affecting sale and delivery of European product are addressed effectively.

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

“ During the pandemic we all appreciated the power of collaboration across the tourism sector. Now we’re experiencing strong demand once more we’re committed to building on our strategic relationships in the wider interests of our industry and clients. ETOA remains a good friend to CATO, keeping us informed about the business environment in Europe, and ensuring the transatlantic dialogue stays strong.

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





## EUROPEAN TRAVEL AGENTS' AND TOUR OPERATORS' ASSOCIATIONS (ECTAA)

“ Having worked on tourism policy together for decades, as a private-sector industry partner ECTAA is delighted to be collaborating with ETOA to deliver a sustainability-focused workshop later this year. Our members represent an extensive network of agents and operators across Europe, so we know the demand is there for product that helps consumers and business explore new options, manage their impact, and contribute to positive change.

Eric Drésin  
Secretary General, ECTAA



## NETWORK OF EUROPEAN REGIONS FOR SUSTAINABLE AND COMPETITIVE TOURISM (NECSTOUR)

“ NECSTouR exists to support sustainable and competitive tourism across Europe. ETOA's support and industry insight make an invaluable contribution to our work with regional policy makers and experts working on long-term strategy as well as practical solutions to deliver better tourism.

Cristina Nuñez Cuesta  
Managing Director, NECSTouR



## Nordic Tourism Collective

The Nordic Tourism Collective (NTC) is acting as ETOA's representative in the Nordics and Scandinavia. NTC is an independent, not-for-profit collaborative membership network for the Nordic and Scandinavian travel and tourism industry.



NORDIC TOURISM  
COLLECTIVE

## New Deal Europe

New Deal Europe (NDE) is ETOA's representative in the Greater Balkan region of Europe. NDE brings together tour operators, Balkan suppliers and destinations to promote this rapidly growing tourism destination.



NEW DEAL EUROPE



# INSIGHTS & DATA

GIVING MEMBERS THE MARKET INTELLIGENCE AND KEY NUMBERS THEY NEED TO HELP THEM MAKE THE RIGHT CHOICES FOR THEIR ORGANISATION.

## Insight Hub

The ETOA Insight Hub provides a one-stop-shop statistical and insights service for our members. We collate up-to-date research and opinion pieces to help with business decision-making from respected sources such as UNWTO, WTTC and the European Travel Commission, and save you time by summarising the key takeaways in each one.

## Webinars & Briefings

Our frequent webinars serve our members by delivering thought-provoking, insightful and educational conversations on diverse topics. Most webinars will only be accessible for members in 2024. Topics discussed in 2023 include:

- Sustainability
- Source market insights
- Data-led with expert partners
- Visa & Tax policy
- Destination development and briefings
- Tourism & Technology



Find out more:  
[www.etoa.org/insight/](http://www.etoa.org/insight/)



## Data partners

Our four data partners power the Insight Hub and regular data-driven webinars by giving members access to the latest trends and forecasts for Europe from a wide range of sources such as flight bookings, arrivals data, online searches, credit card spend and social media usage. They offer member-exclusive discounts on access to their platforms.

We provide access to summarised academic tourism research and projects via our partners at **CELTH**, the centre of expertise on tourism and hospitality, and our resident tourism stats expert, **David Edwards**, presents lively economic reviews at many of our events.

## Tourism briefings and conferences

We continue to mix our commercial networking events with briefings and insight sessions. In 2023 we held our first Industry Day event in our Brussels office filled with insight sessions and expert panels, supported by MEP Istvan Ujhelyi.

Panels, briefings and insight sessions are also held during GEM and Destinations Exchange Europe.

## OUR DATA PARTNERS



**190+**  
Insight hub posts



**30+**  
Webinars in 2023



**5k+**  
Webinars registrations in 2023