



European tourism association

A photograph of a group of people sitting around a wooden table in an outdoor setting, possibly a cafe or restaurant. The people are engaged in conversation. The background is slightly blurred, showing greenery and a building. The image is framed by blue geometric shapes in the corners.

YEAR IN REVIEW 2025

BETTER TOURISM IN EUROPE

www.etoa.org



Three Locations - One Enchanting Experience

Swarovski Kristallwelten is one of Austria's most visited attractions and transforms Swarovski Crystal into an experience that is constantly changing and reinventing itself.

Spread over 7.5 hectares, this joyful space showcases the work of internationally and nationally recognized artists, designers, and architects.


As unique retail extensions of this wondrous world, **Swarovski Kristallwelten Stores** in **Innsbruck** and **Vienna**, continue to embrace the mesmerizing magic of the beloved crystal destination, combining a magical spectrum of crystalline products and art installations.

swarovski.com/kristallwelten

SWAROVSKI
Kristallwelten
Store Innsbruck

SWAROVSKI
Kristallwelten

SWAROVSKI
Kristallwelten
Store Wien

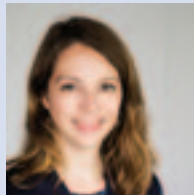


2025 has been a year of consolidation and renewed momentum for ETOA. Our network of over 1000 members continues to prove its strength, bringing together expertise, creativity and determination in the face of ongoing challenges.

While the tourism sector in Europe is thriving, pressures around access, taxation and sustainability remain central concerns. ETOA has worked tirelessly to represent members' interests, ensuring that your voices are heard in policy debates and that practical solutions are advanced.

Yet ETOA is more than its advocacy. It is a community of organisations committed to building a better future for European tourism. Through our events, webinars, partnerships and knowledge-sharing, our members are not only navigating change. You are shaping it.

As President, I am proud of the resilience and innovation our community demonstrates daily and, together with the ETOA team, I look forward to another year of progress and partnership in 2026.



Adele Youngs
President, ETOA

ETOA's policy work remains central to our purpose. We are here to warn, inform and propose ways of solving difficulties.

New restrictions can be placed on access, sudden tax rises imposed and there are massive shifts in the supply base. Change is now endemic. The range of issues that are being addressed can be viewed on our website at www.etoa.org/operating-in-europe/latest-operational-updates/

At the centre of these problems lie the intermediaries, who make up the "buyer" members of the Association. They make a difference by delivering customers in a time, place and volume that is needed. That they can do this makes them different from the individual clients that are obtained through reputation. They add value to suppliers and destinations when business is needed.

This is ever more apparent as Europe moves into full recovery from the death years of the early 2020s. The answer to "overtourism" is balancing demand with supply: finding new areas to sell and different times in which to attract people to Europe.

To this end, we aim to provide a vibrant environment, where members can share ideas and find new products. Companies are now competing through the range and variety of their networks.

ETOA aims to be an integral part of that process.



Tom Jenkins
CEO, ETOA

Scan the QR code
for the latest
operational
updates



BETTER TOURISM IN EUROPE

As an ETOA member, you are part of an ambitious and resilient community of tourism professionals; you bring experience, ideas and knowledge to drive success. Together, our organisations are stronger as we work to create Better Tourism in Europe.

Based in Brussels and London, ETOA is a network of buyers who, together with suppliers and destinations, sell tourism in and to Europe. We represent SMEs and multinationals working with long-haul inbound tourism to Europe, especially from North America and Asia. We identify and address problems, and represent interests on a European and local level. We promote and support a better operating environment and a more sustainable industry.



As a member of ETOA, your investment supports our work on:



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



Networking and
business development
opportunities



Actionable information,
insight and research
supporting your business

MEMBERSHIP IN NUMBERS



1000+
Members
in ETOA



100+
New members
in 2025



260+
Buyer
members



700+
Supplier &
destination members



30k
Tourism professionals
in our database



27k+
LinkedIn
followers

OUR COMMUNITY

We work for better tourism in Europe – creating more opportunities for members to grow and succeed through access to our network, B2B events, lobbying activity and data & research – and we have been doing that for over 35 years.



MAKE THE MOST OF YOUR MEMBERSHIP



Connect anytime through our online member search



Attend B2B workshops and social events



Learn and share ideas through interest group meetings



Promote your brand through sponsorship and adverts



Join GEM – ETOA's flagship event



Get up-to-date information on operational changes in Europe



Access insight to help you make better decisions



Exhibit with ETOA at WTM London and in long-haul markets



Save up to 40% on member-exclusive events packages



Support your tour guides through ETOA's Tour Guide ID card programme



Get involved through working groups and webinars

Scan the QR code for more information on membership benefits



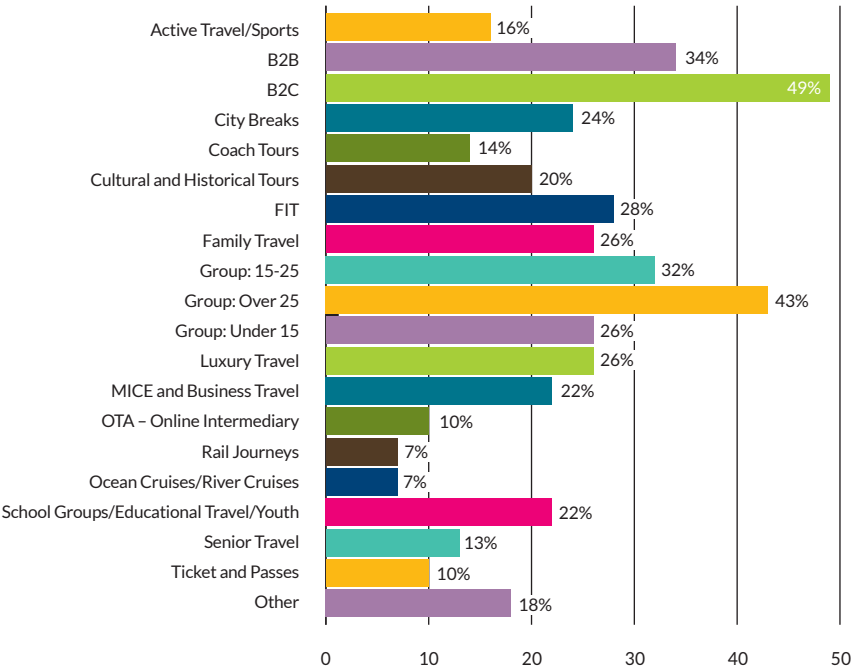
A SELECTION OF NEW MEMBERS



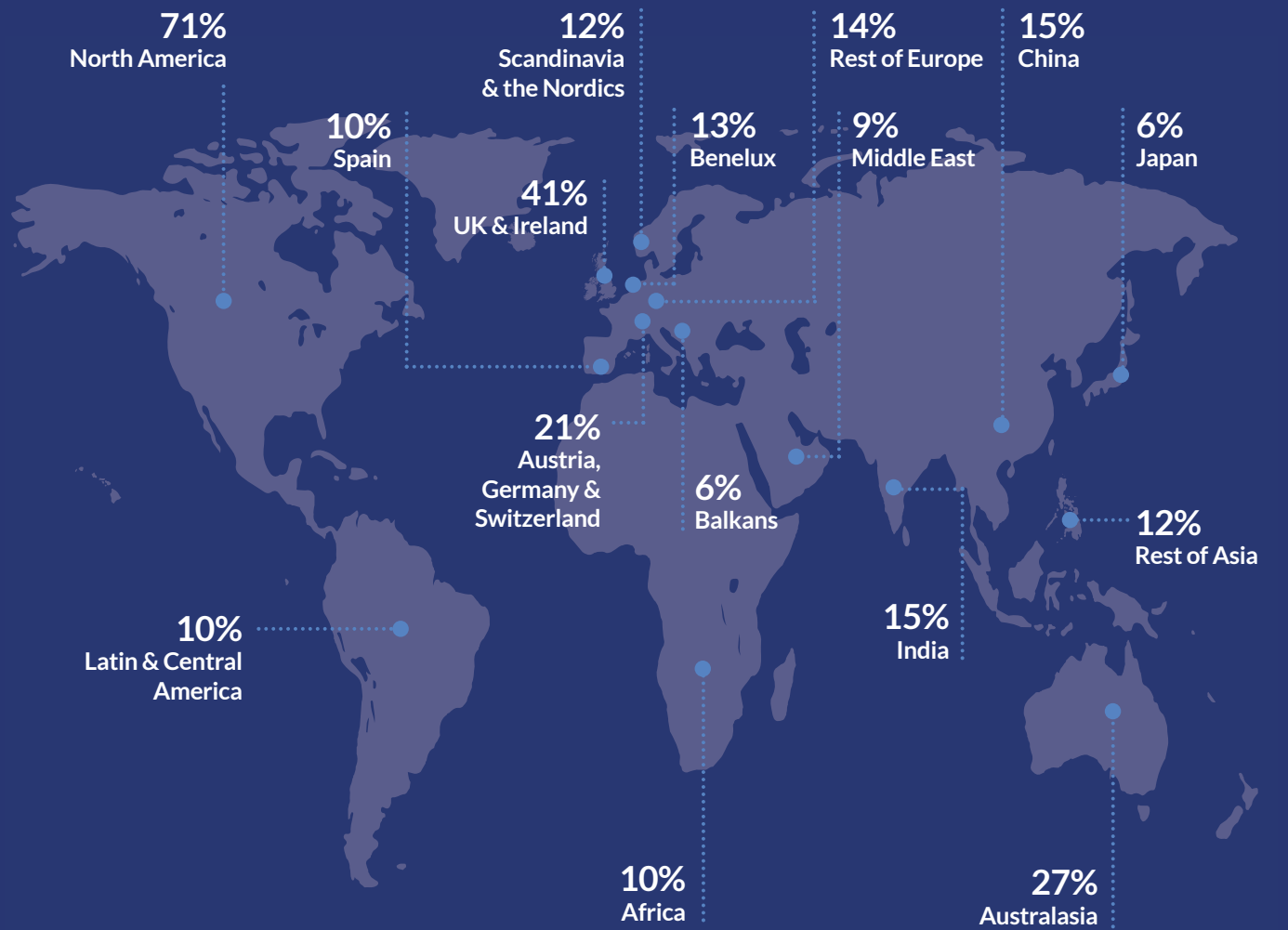
MEMBERSHIP PARTNERS



WHAT ETOA BUYER MEMBERS SELL (%)

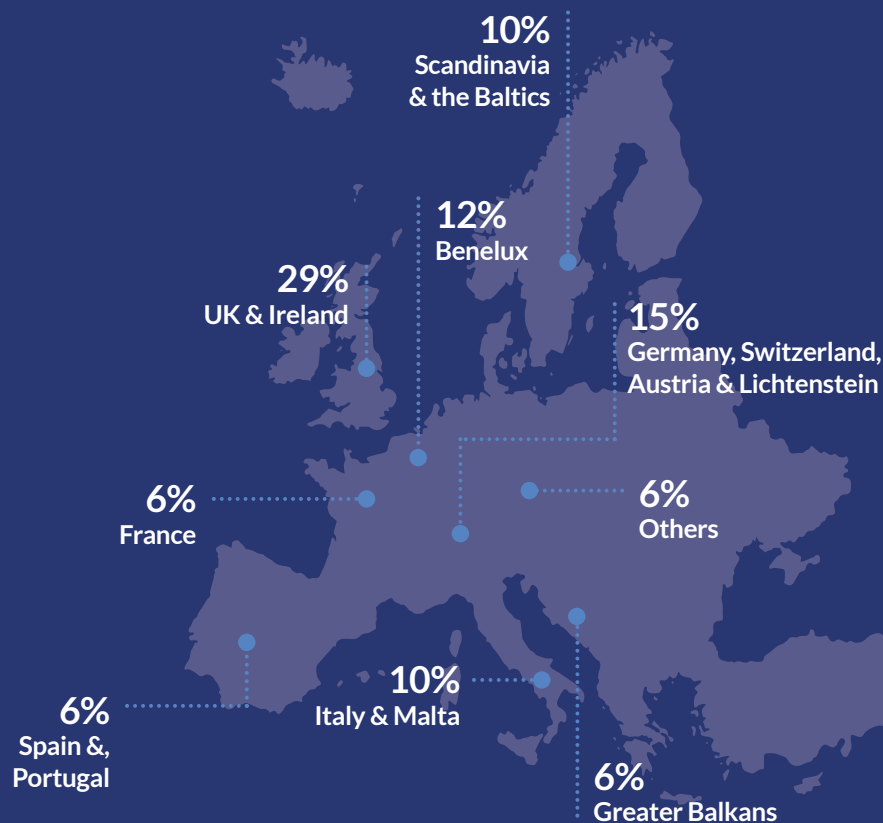


OUR SOURCE MARKETS

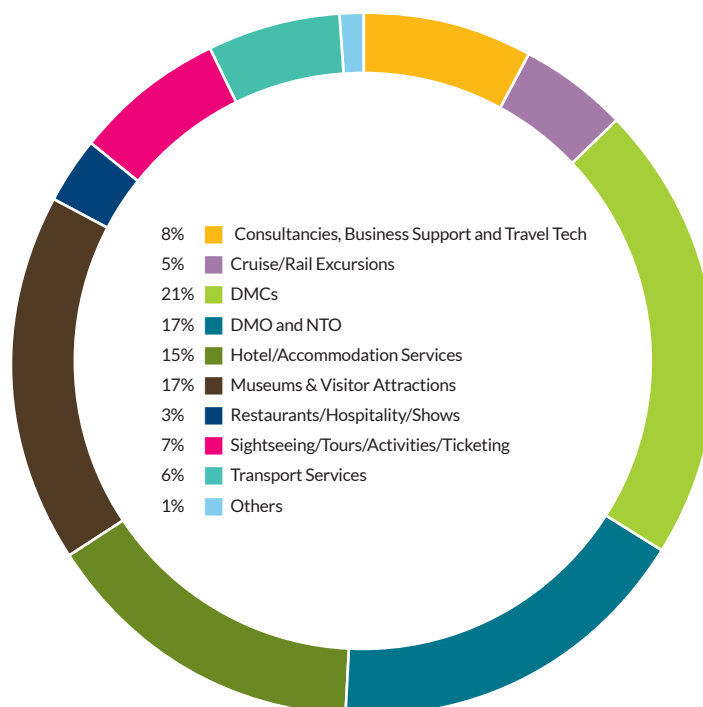




OUR EUROPEAN SUPPLY NETWORK



WHAT OUR SUPPLIER MEMBERS OFFER (%)



WHAT OUR MEMBERS SAY



Our membership has been great. We have had the chance to take part in so many events and webinars. This gives us lots of insight about the source markets we trade with already, but also new ones we're interested in working with.

Othmane Ammari,
B&B Hotels Group



We value the membership very much because it brings us the news of the world – and it gives a voice in tourism. It's very important for us to have a key indication of what's happening in the world, and it helps connect with suppliers and other partners. We often refer to the webinars and to the policy pages online because we need to keep ourselves up to date. ETOA is able to provide this information, so we don't have to go and search for it ourselves.

Alessio Marcolongo
Procurement Manager – Hotels
(UK & Benelux), Kuoni Tumlare -
GlobalDestinationManagement
by JTB



My collaboration with ETOA has always been an excellent experience. The professionalism and support from the team – especially through their webinars and events – make membership truly valuable. ETOA provides access to important industry conversations and creates opportunities to connect with high-quality tourism businesses across Europe. I greatly appreciate our partnership and see strong potential for future cooperation.

Rossella Pfundt
CEO, Success with Tourists



ETOA is a great way of not only meeting partners and new potential partners, but also a way to learn what is happening in the industry. What I like the most is probably the networking. It's not just the official meetings, but also the informal meetings and the knowledge sharing. To summarise ETOA in few words: I would say exciting, mutually beneficial, and very useful.

Fero Bakos
Product Manager, River, TAUCK



ETOA is a way for us to stay connected to the industry. Since all our business is in Europe, ETOA provides information, support and connection. When taxes change, when group policies change, when any sort of new regulation happens, we use the website to figure out what's going on.

Mitch Shelley
Tour Operations Specialist,
Rick Steves' Europe



It's a wonderful partnership for us because it brings us to events like this [GEM]. It gives us a great chance to network, meet with suppliers and find other opportunities. ETOA also gives us a space with likeminded people in our industry where we can talk about some of the challenges we face, rules, regulations, changes and everything else. If I could summarise my membership with ETOA in three words: perfectly aligned, cooperative and supportive of our industry.

Chris Treloggen
Managing Director, Contiki Europe

CONNECTING YOU

ETOA's B2B events offer unparalleled networking and contracting opportunities for tourism professionals who organise and sell European product in markets around the world.

Our workshop events are offered online and face-to-face, driven by our powerful appointment matching system, helping buyers and sellers meet the right people.

ETOA Socials

We have held social receptions for our members and partners in **Dublin, Liverpool, Rome, Barcelona, Paris, Zurich, Edinburgh and Milan.**



Scan the QR code
for more information
on events



49k+
Meetings
held



2500+
Attendees at
our B2B events



400+
Attendees at
our socials

EVENT PARTNERS





Showcase Outbound

These month-long initiatives offer opportunities for you to connect with ETOA's four core long-haul source markets: North America, India, Japan and China. You decide which investment is right for you.

Opportunities include online only, in-person workshops in-market as well as co-exhibiting options at famous travel trade fairs in China we are including our popular B2B workshop CEM, which now includes three cities: Guangzhou, Beijing and Shanghai

SHOP

ETOA's new B2B event SHOP will focus on Shoulder and Off-Peak demand. This will appeal to any destination or supplier that seeks business outside of the main season and those destinations that lie off the beaten track.

Supporting balanced tourism in destinations is crucial: we need to work on bringing tourists to the right place at the right time. SHOP is there to do this.

Tour Operators function best when they are needed. With many destinations filling at high season, there is an opportunity for operators to intervene. Clients can be brought outside the most crowded months.

Most destinations have predictable dips in demand; many operators are seeking to extend their product portfolio outside the peak months, away from the crowds.

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

EXHIBIT





WHY ATTEND OUR EVENTS?



Great meetings, good list of suppliers, superb booking system, easy to organise and well managed on the day.

Diane Ferguson from Henrietta Ferguson Luxury Tours attended GEM 2024



Fantastic BIM 2025. I always find BIM to be an excellent event with a great selection of suppliers. The location is great and the room works really well. Lots of great meetings and possibilities always come from this event.

Liz Aungier from Sheenco Travel attended BIM 2025



This online exhibition has exceeded my expectations. First of all, the businesses and products of most of the invited merchants are quite in line with my expectations. Secondly, when talking with these partners, they all show a very friendly attitude and patience. Moreover, most of them would ask me at the end: How do you consider the cooperation between us; do you think we have a chance to cooperate? This makes me feel that they also attach great importance to the Chinese market and treat this meeting very seriously. The atmosphere of the entire exhibition is very good, which reminds me of the years when everyone was full of hope for cooperation, and consensus can even surpass language, forming a tacit understanding of communication in a short period of time.

Meina Zou from Y.S.J. Travel Service attended ETM Asia 2024



First time attending superb workshop and I liked it being 2 1/2 days as it gave you options to do other things each day. Great opportunity to learn about the Scandinavian market for potential programming in the future, which was the purpose of attending. My focus was very much around Norway, but came away with completely new opportunities in different countries. Another great workshop from ETOA.

Janine Cuff from Albatross Group attended Nordics 2025

ACTIONABLE INSIGHT

2025 has seen over 70 additions to the Insight Hub, covering a wide range of tourism trends and prospects. We have shared high-level reports from UN Tourism and ETC showing an increase of 5% in overnight international tourism globally and 2% year-on-year increases for Europe, taking demand to 5% up on 2019.



We have delved deeper into these trends in the summaries of our Origin Market Interest Groups for India, China, Japan and North America – discussing the re-emergence of Asian markets and volatility in US demand.

We have supported our members with statistics and insight around the benefits of event tourism, the rise of experiential travel and demand for cooler European destinations in the face of climate shifts.



Artificial intelligence

As AI becomes

increasingly important as a tool for personalisation, marketing and customer service, we have brought a range of webinars, checklists and reports on evolving travel technology trends direct to our members.



Pulse Checks

ETOA members have shared insights in our rapid-fire Pulse Checks, revealing a clear shift in sentiment on the 2025 operating environment.

Notably, 57% of members now believe conditions are becoming moderately or much more difficult – up sharply from 39% in December 2024.

Through the more than 40 webinars we have held, discussions have formed around source market demand for Europe, trends in different traveller segments, the resilience of organised tourism and Climate Action.

As we head into 2026, the challenges facing our industry move from health and ability to travel to geopolitical instability, market volatility, border security and resilience in the face of climate change. We hope our Insight Hub will continue to support with data, reports and expert opinion.

Origin Market interest groups

In 2025, we launched member-exclusive meetings focused on ETOA's four key source markets: North America, Japan, China and India. Quarterly online sessions give members a chance to explore market trends, network and share ideas.

400 members have already participated this year.

Scan the QR code for more information on the ETOA insight hub



40+
Webinars
in 2025



3450+
Webinar
registrations



70+
Insight
posts

INSIGHT PARTNERS



BUSINESS ENVIRONMENT REMAINS CHALLENGING

ETOA's destination and topical working groups, together with our close-knit network of connected professionals across Europe, ensure we stay informed and remain credible as a voice of industry to policy-makers.



Better information online

We launched latest operational updates online to make it easier to monitor developments, as well as a new member-only LinkedIn group.

Scan the QR code
to join our new member
only LinkedIn group



Guiding Regulation

As AI drives the development of digital tools, the distinctive human touch provided by **multi-day tour guides** is one of organised tourism's most distinctive features.

We continue to argue for a more open market for well-suited individuals and continuity of cross-border service provision, and oppose protectionist practices through our **lobbying and support services**.

Coach Tourism and Destination Access

As well as providing accurate information about changing access arrangements and group size restrictions in destination, ETOA's voice at policy forums champions the value of coach transport, from its product adaptability to its economic and environmental credentials.

Tax and Tourism

From monitoring new **overnight taxes** and the calendar for **Venice day tax** to challenging the practicality of Edinburgh's implementation of **Scotland's visitor levy** and arguing for export-friendly VAT schemes, ETOA remains an authoritative voice on tax and Europe's visitor economy.

Scan the QR code
for the latest
operational updates



Visa and Borders

Spain's Royal Decree requiring service providers to report unusually detailed client data pre-arrival continues to be problematic. For further information visit: www.etoa.org/royal-decree-spain

As Europe's border controls evolve, ETOA maintains accurate information on the UK's **ETA**, and the Schengen area's **EES** and **ETIAS**, including their operational and commercial implications, supported by our own market impact surveys. For further information visit: www.etoa.org/operating-in-europe/visas-and-borders

Attractions and Ticketing

From changes to group access for the **Van Gogh Museum** in Amsterdam to continued difficulties with the **Louvre** in Paris, access to Europe's major museums remains a hot topic. In Italy, ETOA worked closely with partners to ease new restriction at **St. Mark's Basilica** in Venice and continues to coordinate dialogue with the **Colosseum** in Rome.

ETOA Working groups

- Group Tourism
- Attractions & Ticketing
- Rome
- Venice
- Ireland
- Paris
- Barcelona
- Spain & Portugal
- Amsterdam

Scan the QR code
for more information
about working groups



ETOA IN THE HEART OF EUROPE

ETOA is part of the T4T Together for EU Tourism Expert Group and has helped deliver three webinars on product development, collaborative governance of tourism destinations, and policy and practice affecting cross-border travel.

We contributed to targeted consultations on the EU Sustainable Tourism Strategy and the Sustainable Transport Investment Plan.

With partners we continue to press for better regulation: the final proposal for a reformed **Package Travel Directive** meets most of industry's needs while maintaining high levels of consumer protection.

Attention now shifts to the **VAT package consultation on the Tour Operators Margin Scheme (TOMS)** and passenger transport.

ETOA continues to take a leadership role in the **European Tourism Manifesto**, a cross-sectoral alliance of public and private sector stakeholders, building consensus on strategic priorities. For further information visit: tourismmanifesto.eu

EU projects

ETOA joined the Advisory Board of D3Hub, an EU funded project focused on developing and integrating data-driven good practice among DMOs.

ETOA remains active in The Pact for Next Tourism Generation Skills (PANTOUR), a consortium focused on designing innovative and cooperative solutions to address skills needs across the entire tourism ecosystem.

Our next collaboration is at this year's GEM conference with a Keynote and panel on: **Will my job exist in 5 years? The changing landscape in tourism careers employment and skills.**



INDUSTRY PARTNERS





CLIMATE ACTION & SUSTAINABILITY

At ETOA, sustainability means climate action, improved products and policy work. We track and manage our impact, help members find solutions, and collaborate with institutions, experts and partners to build a smart regulation, funding and best-practices framework.

From decarbonisation to diversification, we work with operators responding to global demand, the European supply chain and host destinations to align interests of climate, community and commerce.

We continue to collaborate with **OECD**, **Travel Foundation**, **UN Tourism** and **USTOA** to align interests, especially on the harmonisation and comparability of core metrics.

In February, we hosted a Climate Action Workshop in Brussels to explore practical options for adaptation.

As part of our solutions-based approach, we announced a new partnership with **ZEERO Energy** to accelerate the production of biofuel-from-waste.



ETOA members have shared Case Studies on Climate Action projects to inspire others.



Sustainability Hub

We have launched our Sustainability Hub

featuring a range of content to support transition, grown a community of over 160 member contacts focusing on topic, and spoke at a wide range of events on topic.

Scan the QR code to visit the ETOA Sustainability Hub.



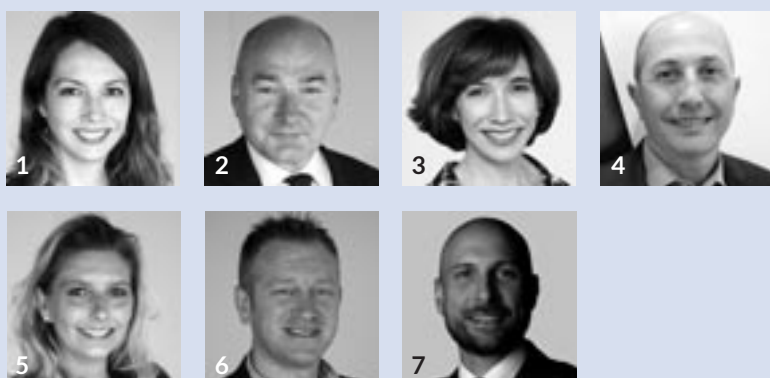
CLIMATE ACTION & SUSTAINABILITY PARTNERS



ETOA BOARD AND ADVISORY COUNCIL

ETOA's Board and Advisory Council give members the chance to have a real say in the various activities of your association and the issues that affect you. The Council meets quarterly and is responsible for overseeing all ETOA practices and finances.

BOARD



- 1 Adele Youngs, President, ETOA / Founder, Live Travel and Tours
- 2 Tom Jenkins, Director and CEO, ETOA
- 3 Jennifer Tombaugh, Vice President, ETOA / CEO, Tauck
- 4 Marco de Rivo, Treasurer, ETOA / Head of Hotel Operation, MIKI Travel
- 5 Helene Dambeck, Board Member, ETOA / Vice President of Global Procurement, EF Education First
- 6 Marco Weijgertse, Board Member, ETOA / Head of Purchasing, TourAxis
- 7 Martin Saponi, Board Member, ETOA / Vice President of Sales, Southern Europe, Accor

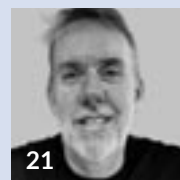
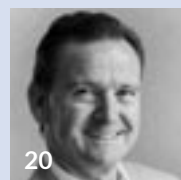
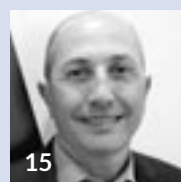
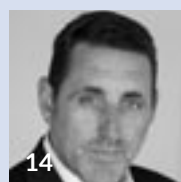
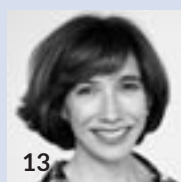
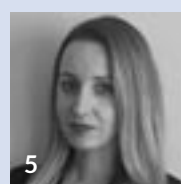
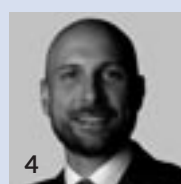
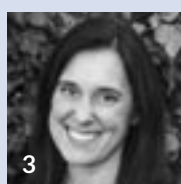


Some of our valued destination members have hosted ETOA's Board and Advisory Council meetings over the last year.





ADVISORY COUNCIL



- 1 Sean Taggart, Founder, TourEasy
- 2 Kristiane Heyne-Strauch, Managing Director, Service-Reisen Giessen
- 3 Robyn Stencil, Program Manager, Rick Steves' Europe
- 4 Martin Saponi, Vice President of Sales - Southern Europe, Accor
- 5 Viktoria Lacroix, Vice President of Destination & Partner Development, EMEA, Go City
- 6 Mickael Reis, Senior Regional Director - Paris & EMEA Market Expansion, Go City
- 7 Petra Stušek, CEO, Ljubljana Tourism
- 8 Eduardo Santander, CEO, European Travel Commission
- 9 Paul Wagner, Director, Nordic Tourism Collective
- 10 Adele Youngs, Founder, Live Travel and Tours
- 11 Helene Dambeck, Vice President of Global Procurement, EF Education First
- 12 Jean-Philippe Monod, Vice President - Government and Corporate Affairs, Expedia
- 13 Jennifer Tombaugh, Vice President, CEO, Tauck
- 14 LeRoy Sheppard, Director of Sales - UK and Ireland, Maritim Hotels
- 15 Marco de Rivo, Head of Hotel Operation, MIKI Travel
- 16 Marco Russi, Chief Operating Officer, Kuoni Tumlare Management by JTB
- 17 Marco Sobara, Chief Operating Officer, Globus Family of Brands
- 18 Marco Weijertse, Head of Purchasing, TourAxis
- 19 Ramón Van Der Storm, Director, Blue Boat Company
- 20 Tristram Yarde-Leavett, Managing Director, Tourwise of London Ltd
- 21 Christopher Treloggen, Managing Director, Contiki

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World of Wonders

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Experience true grandeur with enchanting views of the Fairytale Forest and the spectacular Aquanura fountains. The Efteling Grand Hotel offers everything you need for an unforgettable stay: two exquisite restaurants, a charming boutique, a swimming pool and relaxing spa facilities. Our dedicated staff ensures every moment is truly extraordinary.

Interested in partnering with Efteling or booking a visit to Efteling?
Contact us: [efteling.com/traveltrade](https://www.efteling.com/traveltrade)

