



European tourism association

## Briefing: Climate Action Workshop, 26.02.2025

### European inbound tourism

European inbound tourism is a vital source of export revenue and complements domestic demand. It is growing due to global demographic and economic trends, and Europe's continued appeal as a destination. Long-haul tourism accounts for 15% of arrivals to Europe: 114mn in 2024 (119mn in 2019), forecast to be 129mn in 2025.<sup>1</sup> Companies selling European travel and tourism product around the world are part of the export economy, as are the service providers and destinations who welcome their clients. Whether the European inbound remains competitive and delivers net benefit to people and planet are strategic questions for policy makers, destinations, and industry.

Aviation is necessary to tourism and the wider economy, however long-haul tourism's dependence on flying and its continued growth makes overall decarbonisation in the short-to-medium term more challenging. The greater the carbon cost of arrivals, the greater the pressure to decarbonise in destination, manage resources well, and maximise the value of visitors. Flying is not the problem, fossil fuels are, but for sustainable aviation fuel (SAF) to play a sufficient role in decarbonisation given aviation's growth, very rapid acceleration in production is vital, as are efficiency gains in airline equipment and operations.

While some long-distance routes see effective competition from road and rail, modal shift requires stronger price signals, improvements in ticketing, services, infrastructure, capacity management and competition. Meanwhile, many destinations would suffer serious economic loss but for the business airlines bring. For inbound tourism, despite its original intention, the EU's Emissions Trading System (ETS) only covers the aviation sector in Europe, leaving global measures to ICAO's [CORSIA](#).<sup>2</sup> Minimum fares to cover carbon cost would require a consensus on merits and metrics which does not yet exist.

### A New Mandate for Change

The new Commissioner for Sustainable Transport and Tourism is tasked with developing a Sustainable Transport Investment Plan and maintaining Europe's standing as a leading destination.<sup>3</sup> Across all sectors, sufficient emissions reductions will require affordable, clean energy whose supply is central to the European Commission's [EC] proposed Clean Industrial Deal<sup>4</sup> (building on the Green Deal Industrial Plan<sup>5</sup>), delivering competitiveness and meeting emissions reductions goals. Tourism can contribute to the success of both. We will need a whole-of-government approach to ensure it does.

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<sup>1</sup> Source: Tourism Economics, Forecast release December 2024. See Appendix A for more details.

<sup>2</sup> [https://climate.ec.europa.eu/eu-action/transport/reducing-emissions-aviation\\_en](https://climate.ec.europa.eu/eu-action/transport/reducing-emissions-aviation_en)

<sup>3</sup> [https://commission.europa.eu/document/download/de676935-f28c-41c1-bbd2-e54646c82941\\_en?filename=Mission%20letter%20-%20TIZIKOSTAS.pdf](https://commission.europa.eu/document/download/de676935-f28c-41c1-bbd2-e54646c82941_en?filename=Mission%20letter%20-%20TIZIKOSTAS.pdf)

<sup>4</sup> <https://www.politico.eu/article/eu-clean-industrial-deal-to-cover-six-themes-from-energy-prices-to-trade/>

<sup>5</sup> [https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal/green-deal-industrial-plan\\_en](https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal/green-deal-industrial-plan_en)

But the Draghi Report on EU competitiveness<sup>6</sup> does not mention tourism, nor does the EC's January's announcement of the EU's 'Competitive Compass' to help Europe "become the place where future technologies, services, and clean products are invented, manufactured, and put on the market, while being the first continent to become climate neutral<sup>7</sup>." Nonetheless, we believe that with the right support and strategic integration across a range of policy areas, the visitor economy can drive demand for these products and services, managing down negative impact and maximising benefit for people and places throughout Europe.

## Decarbonisation in a competitive business environment

Sectoral decarbonisation depends on an enabling framework of smart policy, appropriate funding, and rapid uptake of good practice. It also depends on continued commercial viability in a competitive environment that is subject to ongoing cost pressure and uncertainty. Business concerns include current and upcoming compliance obligations; implications of mandatory sustainability reporting<sup>8</sup> and the proposed Green Claims directive<sup>9</sup>; and a lack of comparability among certifications. Despite sectoral self-interest in a successful green transition, it may not inform day-to-day management priorities and operations, especially in SMEs (though some, seeing an opportunity, specialise in low-carbon travel).

Obstacles to decarbonisation are familiar. This workshop will focus on the motivations and opportunities to accelerate progress, and implications for public and private sectors: from international institutions to destinations; multinationals to small businesses. We invite delegates to contribute ideas and insight to help us reach actionable conclusions that will inform ETOA's advocacy, support materials and partnership strategy, and our contribution to policy development. More preparation materials are available [here](#).

## About ETOA

Based in Brussels and London, the European Tourism Association (ETOA) has c.1,100 members. One third are operators who buy services in Europe, two-thirds are supply chain and destinations. Some of each are signatories of the Glasgow Declaration<sup>10</sup>, frontrunners in good practice on climate action. ETOA declared a climate emergency in 2020, implemented a climate action plan, and is developing a community of sustainability-focused professionals within its membership. We provide actionable information and practical support to organisations seeking to learn more and adopt good practice.<sup>11</sup>

ETOA's sustainability strategy has two pillars: climate and product. We co-chair the Tourism Manifesto, a consensus-driven alliance of over 70 sectoral organisations in Europe whose top priority for the new mandate was decarbonisation.<sup>12</sup> We contribute industry insight to EU, OECD, and UN Tourism work programmes on sustainable tourism, and collaborate with business, destinations and other partners on product development and diversification, innovation and capacity optimisation. These will be the focus of ETOA's Destinations Exchange Europe event (DEE25) in June.<sup>13</sup>

For more information, please email: [sustainability@etoa.org](mailto:sustainability@etoa.org)

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<sup>6</sup> [https://commission.europa.eu/topics/eu-competitiveness/draghi-report\\_en](https://commission.europa.eu/topics/eu-competitiveness/draghi-report_en)

<sup>7</sup> [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_25\\_339](https://ec.europa.eu/commission/presscorner/detail/en/ip_25_339)

<sup>8</sup> EU : [https://finance.ec.europa.eu/capital-markets-union-and-financial-markets/company-reporting-and-auditing/company-reporting/corporate-sustainability-reporting\\_en](https://finance.ec.europa.eu/capital-markets-union-and-financial-markets/company-reporting-and-auditing/company-reporting/corporate-sustainability-reporting_en) UK: <https://www.gov.uk/guidance/uk-sustainability-reporting-standards>

<sup>9</sup> [https://environment.ec.europa.eu/publications/proposal-directive-green-claims\\_en](https://environment.ec.europa.eu/publications/proposal-directive-green-claims_en)

<sup>10</sup> <https://www.oneplanetnetwork.org/programmes/sustainable-tourism/glasgow-declaration>

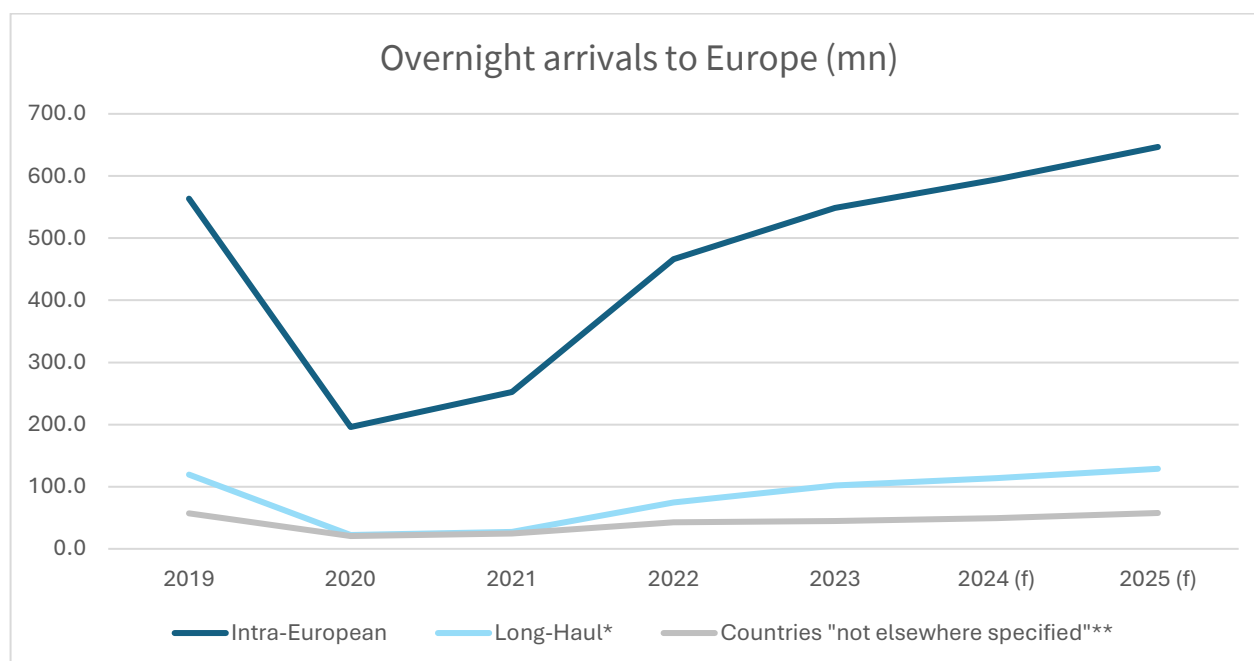
<sup>11</sup> <https://www.etoa.org/climate/>

<sup>12</sup> <https://tourismmanifesto.eu/policy-priorities/>

<sup>13</sup> <https://www.etoa.org/events/dee/>

## Appendix A

### Overnight arrivals to Europe



#### Arrivals to Europe, absolute numbers (% share)

	2019	2020	2021	2022	2023	2024 (f)	2025 (f)
Intra-European	76%	82%	83%	80%	79%	78%	78%
Long-Haul*	16%	9%	9%	13%	15%	15%	15%
Countries "not elsewhere specified"***	8%	9%	8%	7%	6%	7%	7%

#### Arrivals to Europe, absolute numbers (mn)

	2019	2020	2021	2022	2023	2024 (f)	2025 (f)
Intra-European	563.5	196.1	252.4	466.4	548.8	594.5	646.7
Long-Haul*	119.3	22.3	27.4	74.9	102.1	113.8	128.9
Countries "not elsewhere specified"***	57.3	20.6	24.8	42.9	44.9	49.7	57.7
<b>Total arrivals</b>	<b>740.1</b>	<b>239.0</b>	<b>304.6</b>	<b>584.2</b>	<b>695.8</b>	<b>758.0</b>	<b>833.4</b>

**Source:** *Tourism Economics, Forecast release December 2024*

*Notes: \*Long-Haul markets include travel from source markets outside of Europe i.e non-European arrivals*

*\*\*Countries "not elsewhere specified" (NES) is a collective total for arrivals from smaller source markets*

**Note:** Data subject to change as more accurate figures for 2024 become available.