

Essential factors



Systematic development of destinations

POLICY AGENDA

November 2025 – EU edition

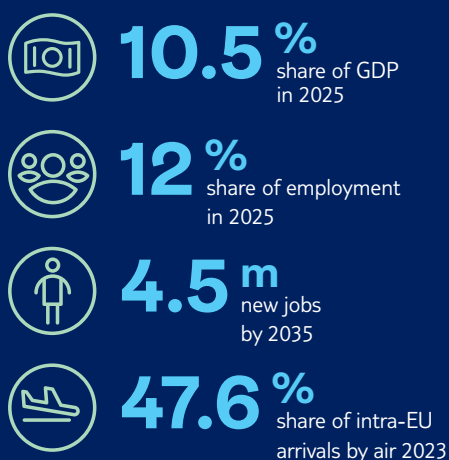
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EU Tourism Strategy

SECURING COMPETITIVENESS

Tourism is a vital driver of the European economy: it accounts for more than ten per cent of GDP and provides jobs for one in nine workers. The EU wants to adopt a new Tourism Strategy in 2026 to fully exploit its potential and be a pioneer in sustainable travel. TUI Group views four priorities as crucial:

Key figures on EU tourism



Sources: World Travel & Tourism Council (WTTC); Eurostat

1. Unleashing growth and restoring competitiveness

Europe's tourism sector is facing increasing cost pressures from regulation, taxes and fees – many of which do not apply outside the EU. These burdens undermine competitiveness and risk diverting tourism growth to other regions of the world. The new EU Tourism Strategy should therefore aim to create a level playing field by reducing unnecessary regulatory hurdles and avoiding additional levies on travel and hospitality. Instead, it should focus on strengthening Europe's attractiveness as a destination and ensuring that tourism remains affordable and accessible for citizens across all income groups.

2. Strengthening the skilled labour force

The acute shortage of qualified personnel is jeopardising the competitiveness of the industry. The hotel, catering and aviation sectors are particularly affected. Businesses are already investing heavily in training and further education. The industry also needs political support. The EU should focus its Skills Agenda more strongly on tourism-related professions, promote dual training models and facilitate the recognition of qualifications in the internal market. At the same time, unnecessary bureaucracy must be removed, particularly when it comes to integrating migrants into the workforce and welcoming seasonal workers from third countries.

3. Delivering sustainable fuels for air and sea transport

The carbon footprint of tourism is directly tied to the decarbonisation of these modes of transport. For airlines and cruise lines, an important lever are sustainable fuels, which are expected to deliver more than half of the CO₂ savings by 2050. However, European production capacities are currently far too low and prices too high. Proceeds from CO₂ emissions trading should be channelled directly into scaling up sustainable fuels production. Companies like TUI have invested in fleet renewal and are ready to use the most sustainable fuels. Now policymakers should use the available funding to create a competitive market for these fuels.

4. Organised tourism: part of the solution for tourism hotspots

Package holidays provide destinations with planning security: they help manage visitor flows and safeguard local jobs without putting pressure on public infrastructure and the housing market – as short-term rental platforms and individual travel do. Vertically integrated tourism groups such as TUI set sustainability standards across the entire value chain. They pool investments, strengthen local supply chains and, in cooperation with local authorities, accelerate the transformation of tourism regions. The EU Tourism Strategy should acknowledge the benefits of package holidays and safeguard their competitiveness.

EU legislation

A NEW COURSE IS NEEDED

A year ago, Mario Draghi, the EU's special adviser on competitiveness, called for a change in legislative policy, warning that Europe would otherwise face a 'slow decline'. This makes it all the more worrying that Brussels continues to fall back into old patterns, burdening businesses with new laws and additional bureaucracy.

Problem 1: Knee-jerk legislative initiatives

European legislators are extremely active, as can be seen in the area of consumer protection on the internet. The EU has enacted a dense set of rules, including laws on digital services and digital markets, as well as the AI Regulation. Nevertheless, the European Commission continues to see regulatory gaps. Its conclusion: an additional, comprehensive law must be introduced in the form of the Digital Fairness Act (DFA).

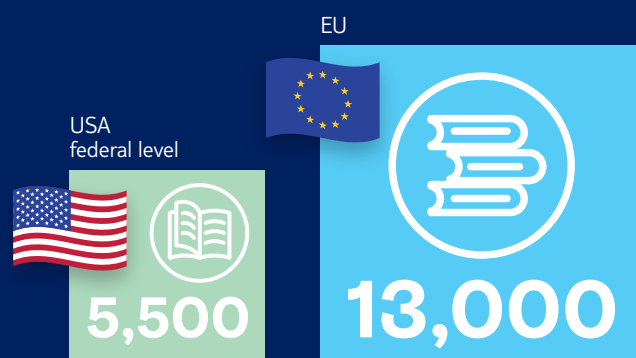
However, knee-jerk responses are not always the best solution. There is no shortage of regulations in Europe. Additional laws create additional bureaucracy – especially when they make such comprehensive claims as the Digital Fairness Act. Therefore, where consumers are demonstrably inadequately protected, rules must be applied consistently. More regulations can only be a last resort.

Problem 2: Disproportionate bureaucracy

In addition to the high density of regulations, legislators often lose sight of the enormous effort involved in many projects. Take, for example, the EU Pay Transparency Directive, which in principle pursues a good goal: greater transparency in wages and salaries. It must be transposed into national law by summer 2026. However, the implementation of the directive is highly complex and fraught with uncertainty. It will entail additional reporting requirements that will keep entire staffs busy. There is a lack of harmonisation with existing EU regulations such as the Corporate Sustainability Reporting Directive (CSRD). Inconsistent definitions, methodologies and timetables lead to additional financial and bureaucratic costs, for example due to duplicate structures.

One thing is clear: consumer protection is a high priority. With its package tours, TUI offers by far the most customer-friendly travel product. In addition, TUI's group-wide 'Equal Pay@TUI' initiative aims to ensure fair remuneration – transparent and globally binding.

Legislation passed 2019 – 2024



Source: Draghi Report

Destination development

TUI IS A UNIQUE PARTNER

Tourism is one of the key drivers of growth and prosperity worldwide. However, for the sector to realise its potential, certain conditions must be in place – flight connections and transport, accommodation capacity and experiences, distribution structures and marketing. These are areas in which TUI is a unique partner, particularly for less developed countries.



“Environmental, social and economic sustainability are at the heart of our agenda for developing destinations. Our strategy includes renewable energy, protecting natural resources and social issues such as housing and the use of local products and services.”

Sebastian Ebel
TUI Group CEO

Tourists spend US\$660 billion per year in emerging and developing countries. This sum outstrips traditional development aid by far and opens up career prospects for millions of people. Tourism also stimulates investment in transport, education and healthcare, strengthening entire economies. Cabo Verde is an impressive example of the potential of tourism as a development driver: thanks to the successful development of a tourism sector the archipelago was able to leave the UN list of the world's least developed countries in 2007. Tourism, which today accounts for 35 per cent of GDP and secures almost every second job, provided a significant boost. Investments by the TUI Group in hotels, flight connections and marketing were a decisive factor in this.

Like no other company, TUI enables the holistic development of travel destinations. An overview:

- **Travel agencies and online platforms:** Over 1,200 company-owned travel agencies and online portals sell TUI travel offers. The sales structures, including marketing, give the destinations access to around 33 million TUI customers.
- **Airlines:** TUI is constantly adding new flight connections to open up new travel regions. The company is focusing on fuel-efficient aircraft and aims to reduce average specific CO_{2e} emissions by 24 per cent by 2030 compared to 2019.
- **Hotels & resorts:** The portfolio is growing worldwide in the medium term from currently around 450 hotels to 600. TUI specifically targets different groups, such as families or solo travellers, in individual regions with different brands. This mix strengthens the resilience of the destinations.
- **Transfers:** Holidaymakers need to be transported between the airport, hotel and attractions. TUI is developing sustainable mobility concepts for this purpose in the travel regions and is expanding the proportion of electric vehicles worldwide.
- **Cruises:** During a one-week cruise, passengers in Europe spend an average of 660 Euros in restaurants and shops, museums and attractions. With its 18 cruise ships, TUI provides many port cities with essential revenue.
- **Activities:** Destinations must offer more than just sun and sand to inspire guests. TUI Musement is an important partner in diversifying the offering, combining a carefully curated product portfolio of excursions, activities and tours, scalable digital platforms and first-class service provided by local teams on site.

TUI on course for growth

Hotel portfolio expansion plan



Cruises

SETTING COURSE FOR INNOVATION AND CLIMATE NEUTRALITY

The cruise industry plays a pioneering role in technical progress and climate protection that should not be underestimated – for the entire shipping industry. Efficiency, innovation and alternative fuels are the keywords. TUI Cruises wants to achieve its ambitious climate targets with concrete steps.

Average age

Mein Schiff and Hapag-Lloyd Cruises are among the most modern fleets in the world and consistently focus on innovative propulsion and environmental technologies.



Mein Schiff fleet
(8 ships)

6.5 years

Hapag-Lloyd Cruises
(5 ships)

10.8 years

Cruise fleet worldwide
(450 ships)

17.5 years

Source: Cruise Industry News,
worldwide as of December 2024

Net zero emissions by 2050

The cruise industry is investing billions in green technologies and setting standards – even though it accounts for only 0.6 per cent of the global merchant fleet. TUI aims by 2030 to reduce absolute CO₂e emissions from its cruise business – which includes the Hapag-Lloyd Cruises and Mein Schiff brands as well as the British Marella Cruises – by 27.5 per cent compared to 2019. The independent Science Based Targets Initiative (SBTi) has reviewed and confirmed these targets. By 2050, the entire fleet is to be climate-neutral, in line with the global industry target. TUI Cruises' climate protection roadmap comprises four levers:

- **Alternative fuels:** TUI Cruises is focusing on low-emission fuels such as bio-LNG and e-LNG, green methanol and sustainable biofuels. See Mein Schiff 7, which will be able to run on green methanol in the future, and Mein Schiff Relax, which was fuelled with bio-LNG for the first time in July 2025. All new ships are designed to run on low-emission fuels.
- **Shore power:** Where possible, ships use green shore power. This guarantees virtually emission-free ship operation in port. This is a key contribution to decarbonisation, as cruise ships spend around 40 per cent of their operating time in port.
- **Energy efficiency:** TUI Cruises is continuously improving energy efficiency, including with new underwater coatings, robot-assisted hull cleaning and the use of engine waste heat. On land, a Fleet Energy Performance Unit supports the fleets in analysing energy consumption and develops concrete optimisation proposals.
- **Route planning:** The energy consumption of the fleets is further optimised through ship management. Route adjustments and optimised arrival and departure times enable lower speeds between ports.

Promoting low-emission fuels and shore power

Despite the clear roadmap, cruise companies are dependent on reliable framework conditions. Politicians are called upon to support the market ramp-up of low-emission fuels. At the same time, only around 20 ports in Europe – mostly in the north – are currently equipped with shore power connections for cruise ships. TUI supports the EU's goal of converting all major ports by 2030. For this to succeed, expansion must be massively accelerated across Europe.

**TUI Cruises
Sustainability
Report 2024**



TUI Colourful Cultures

STRENGTHENING UNIQUE ARTS AND CRAFTS

Arts and crafts are valuable in many ways: they provide income opportunities for people around the world, especially in structurally weak regions. They are an expression of unique cultures. And they strengthen the cohesion of entire communities. The TUI Care Foundation's Colourful Cultures programme helps to leverage this potential.



Take Peru, for example: Thousands of artisans live in the highlands of the Andes. Many live in remote villages where local transport and digital infrastructure are the exception. This makes it difficult to sell cushions, clothes and tablecloths beyond their home towns, and appreciation for the products they make declines – and with it, appreciation for an important part of the centuries-old Inca culture.

In this environment, TUI Colourful Cultures supports over 135 indigenous weavers. The programme shows ways to obtain start-up capital, develop viable business plans and sell products specifically to holidaymakers. Based on traditional patterns, completely new collections are also being created, which Peruvian hotels, for example, use to furnish their rooms and restaurants.

TUI Colourful Cultures programme supports artists and artisans worldwide

“The TUI Colourful Cultures project has changed a lot. We can sell our products at good prices and, as women, we are finally standing on our own two feet.”

Clara Augusta Suyo Carrión
Weaver in the Peruvian Andes



TUI Colourful Cultures Peru

Key figures for July 2022 to December 2024

5	locations
135	weavers
6,500	products sold
63,300	US-\$ in additional income



TUI GROUP

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TUI – the world's leading integrated tourism group



Unique integrated business model



33 million customers traveling to **180** regions



430+ own hotels and resorts



66,800 employees



18 cruise ships



Turnover: **23.2 billion euros**



125 modern short and long haul aircraft



Operational result: **1.3 billion euros**



1,200 travel agencies and leading online portals



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