



26 MAY 2025



EUROPEAN SUSTAINABLE TOURISM MOBILITY FORUM



Ministerie van Infrastructuur
en Waterstaat



Ministerie van Economische Zaken



NBTC
Netherlands Board
of Tourism &
Conventions



Breda
University
OF APPLIED SCIENCES



Welcome

Nina Nesterova

Professor of Sustainable Tourism and Transport
Breda University of Applied Sciences





Welcome

Attila Benedek

Transport & Tourism Policy Advisor
European Parliament



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PROGRAMME



-
- | | |
|---------------|---|
| 10.10 – 10.30 | Tourism and transport trends and developments by Ben Lynam and Camille Mutrelle |
| 10.30 – 11.15 | Opening panel moderated by Anouk van Eekelen |
| 11.15 – 12.30 | Interactive sessions |
| 12.30 – 13.30 | Lunch |
| 13.30 – 15.00 | Interactive sessions |
| 15.00 – 15.30 | Key insights moderated by Attila Benedek |
| 15.30 – 16.00 | Final keynote Koert van Mensvoort |
| 16.00 – 17.30 | Networking drinks |



The trends we saw coming – and still aren't ready for

Ben Lynam

Head of Communications and Research

The Travel Foundation



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TRENDS AND DEVELOPMENTS



 **forum
for the future**
action for a sustainable world



**Tourism
2023**

1

2

3

4

Four scenarios,
a vision and a strategy
for UK outbound
travel and tourism



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TRENDS AND DEVELOPMENTS





Two reliable macro trends:

Climate Change

+

Tourism Growth



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TRENDS AND DEVELOPMENTS



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International Tourism - Overview

● Int. Tourist Arrivals (million) ● Int. Tourism Receipts (USD billion)

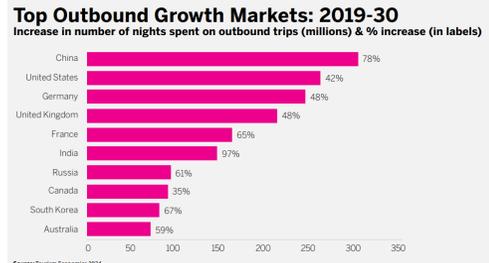
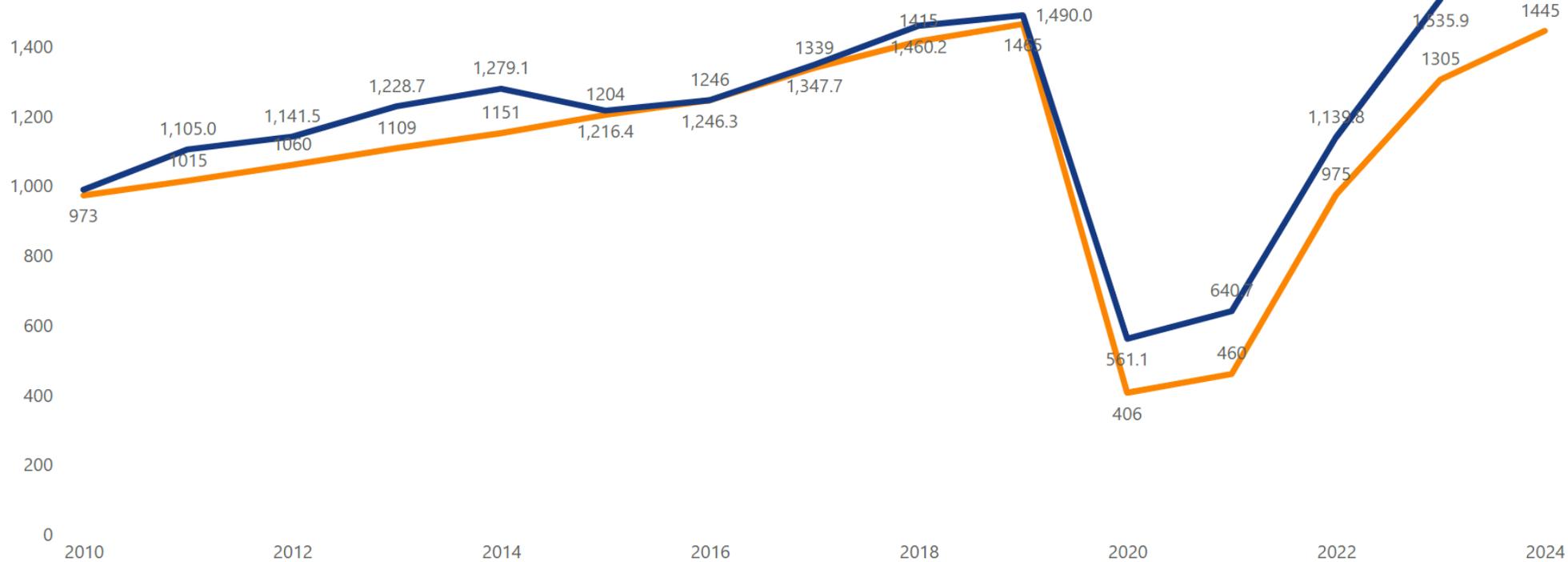
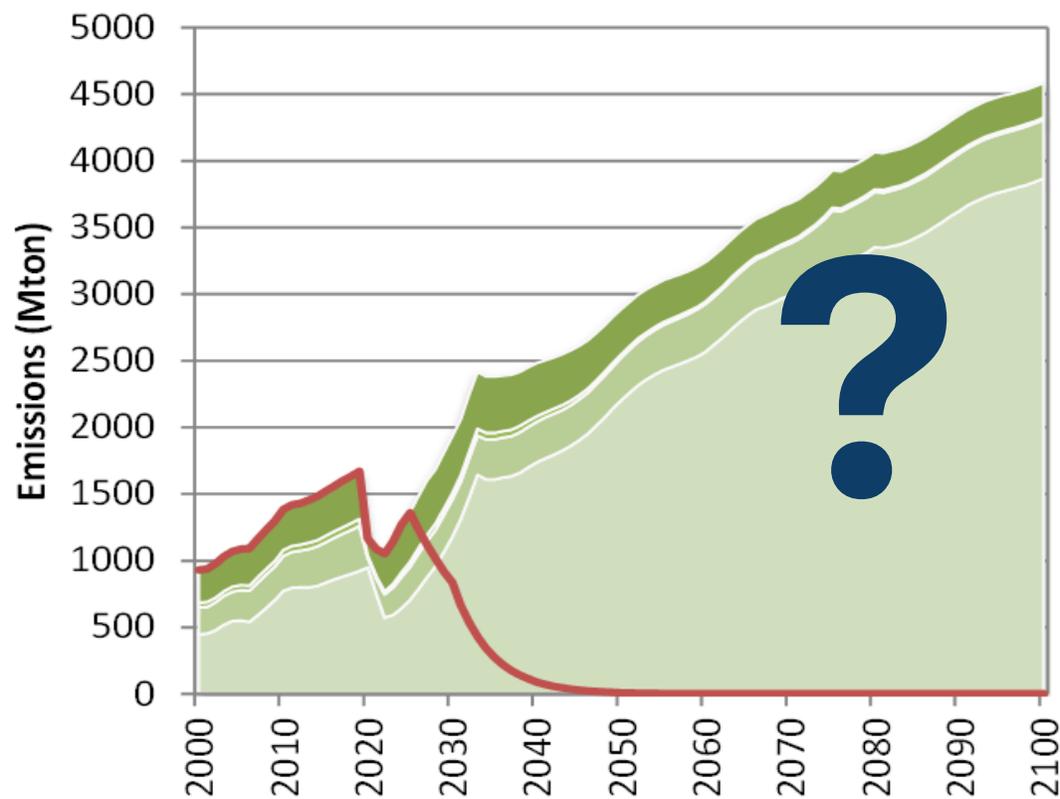




Photo by Rach Teo on Unsplash

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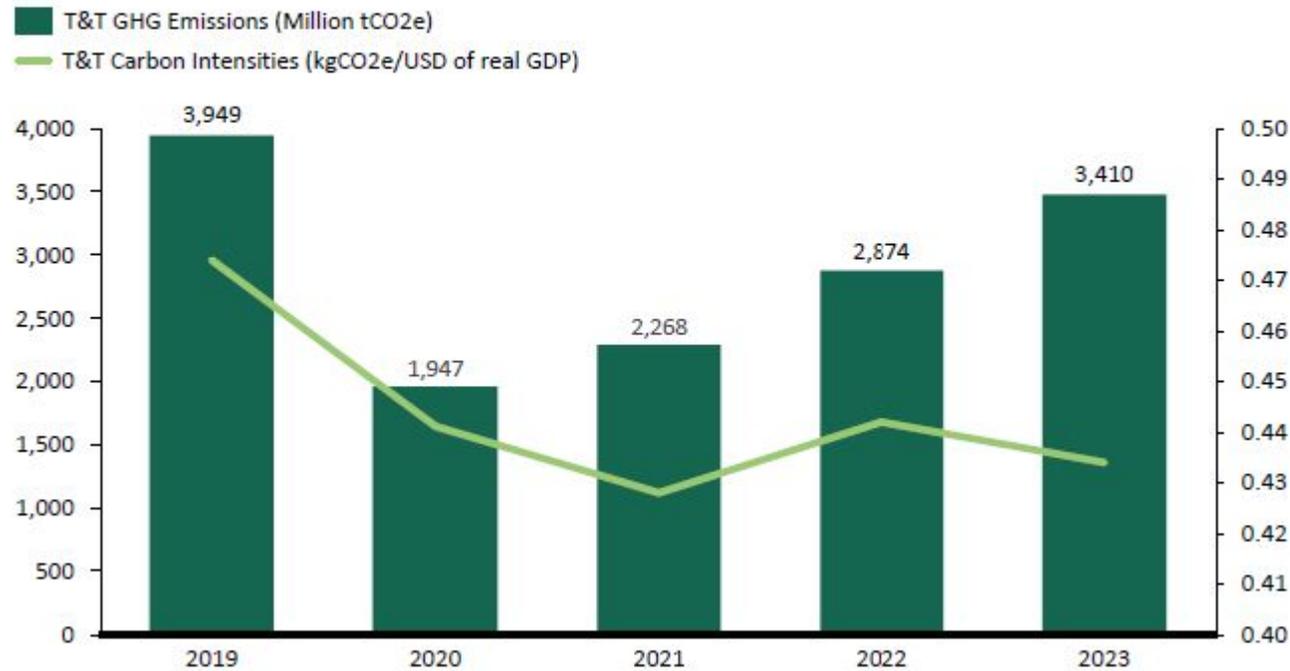
Glasgow Declaration
Climate Action in Tourism

- Accommodation
- Rail, coach, "other"
- Car
- Air
- Emissions goal



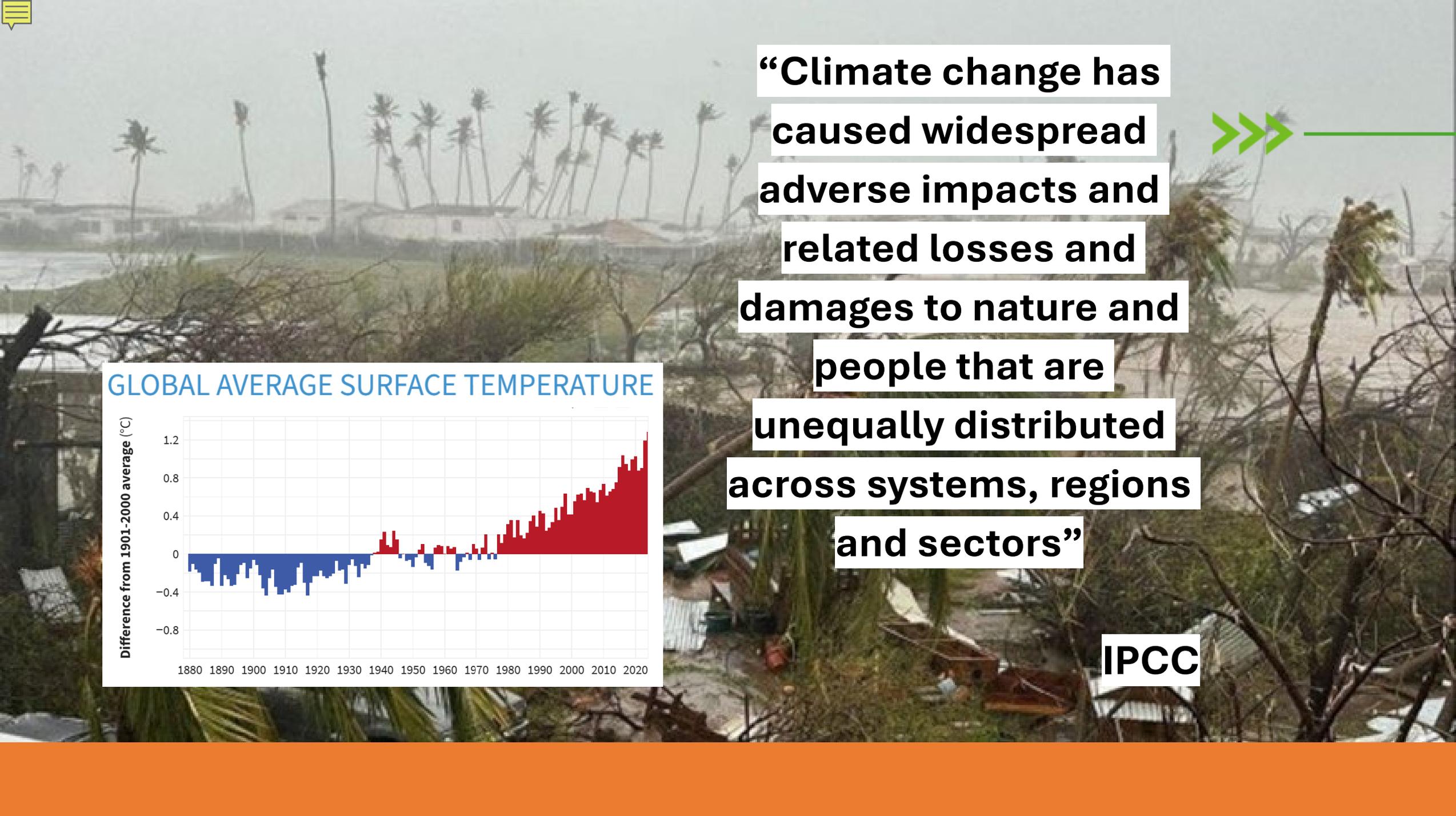


Exhibit 3: Overall Travel & Tourism Emission Footprint & Intensities



**More tourism
means
More emissions**

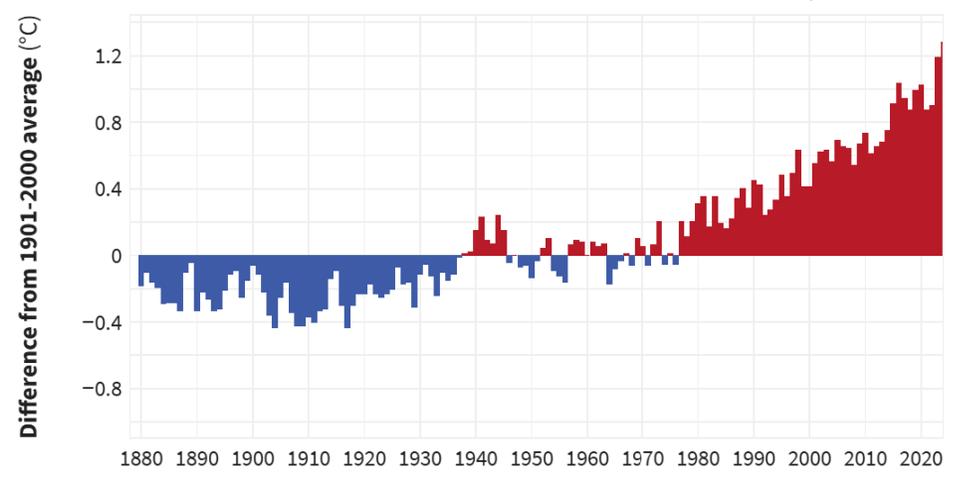
Source: WTTC updated Net Zero Roadmap for Travel & Tourism



“Climate change has caused widespread adverse impacts and related losses and damages to nature and people that are unequally distributed across systems, regions and sectors”



GLOBAL AVERAGE SURFACE TEMPERATURE

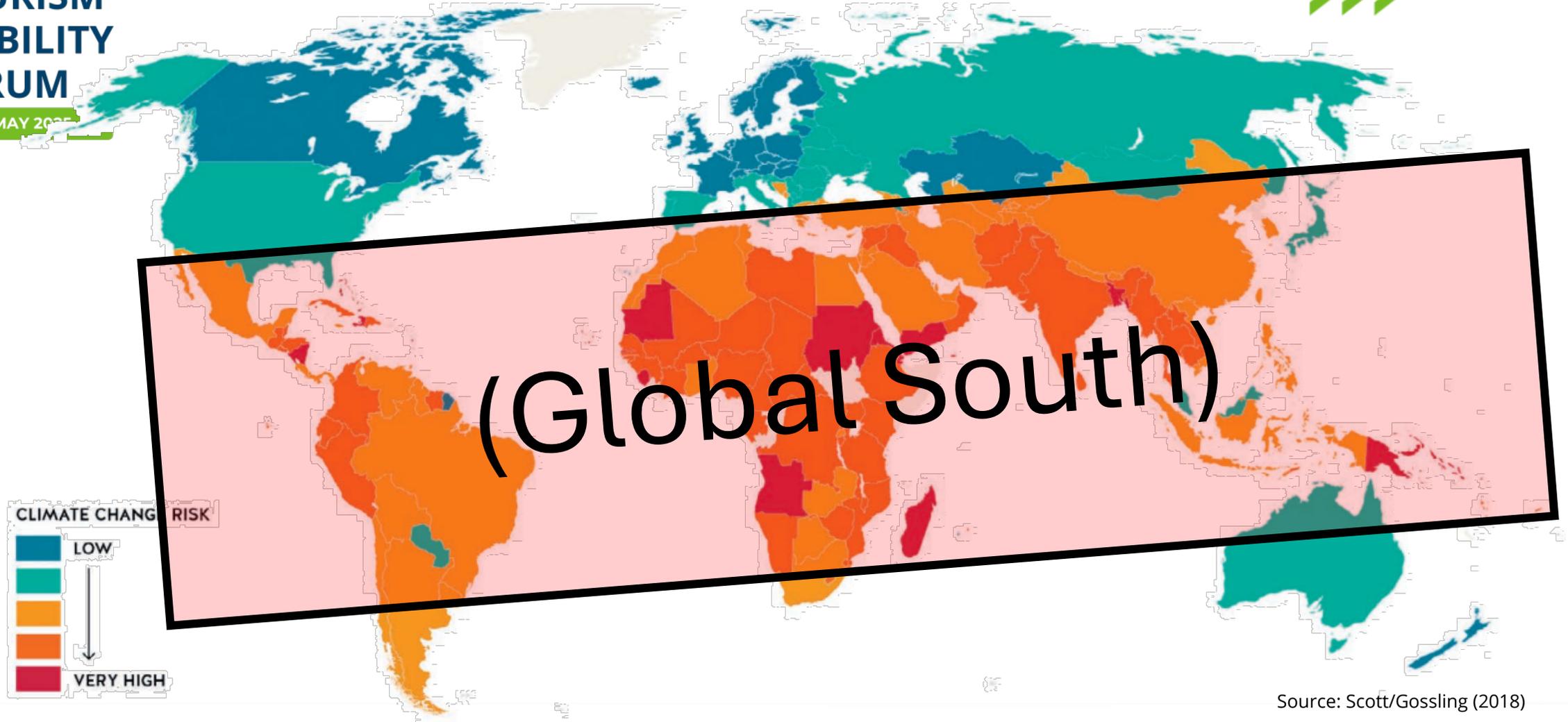


IPCC

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TRENDS AND DEVELOPMENTS



Source: Scott/Gossling (2018)



TRENDS AND DEVELOPMENTS



Thank you!

Ben.Lynam@thetravelfoundation.org.uk





On the Road to a Zero Emission Mobility System

Emission trends and policy
developments

Camille Mutrelle
Aviation Policy Officer

Transport & Environment



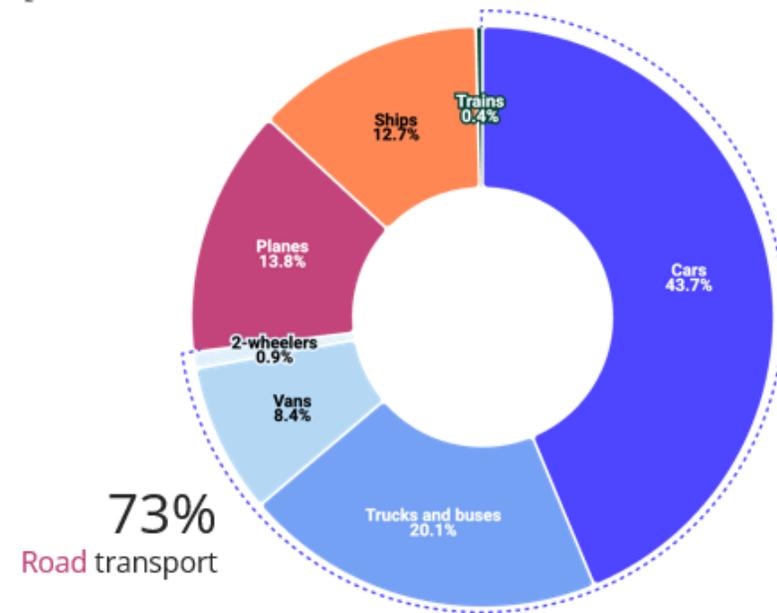


Emission overview

EU share of greenhouse gas emissions by transport mode in 2024

Greenhouse gas emissions by transport mode

MtCO₂e 2024

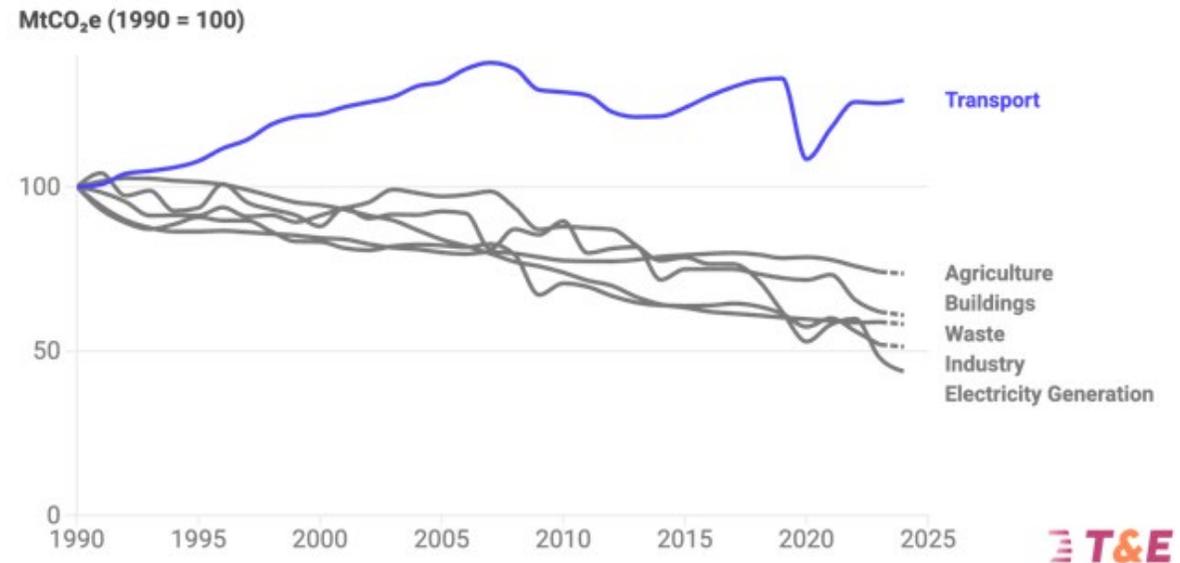


Source: UNFCCC GHG inventories, EEA, Stratas Advisors, Eurocontrol



Transport CO₂ starting to see structural decline

Change in greenhouse gas emissions by sector

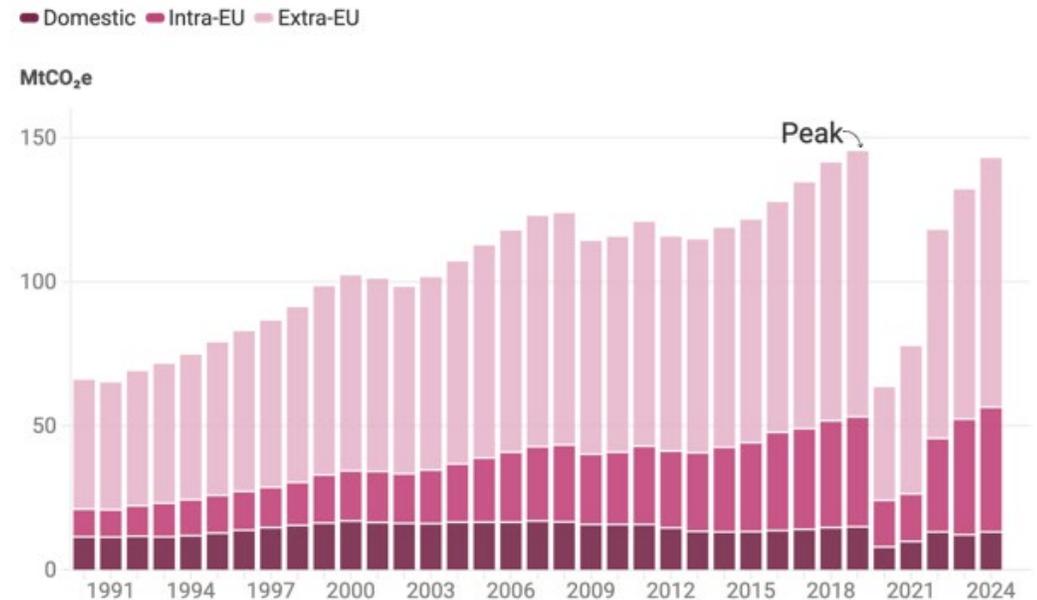


Source: UNFCCC, EEA, [Stratas Advisors](#), [Ember](#) • Transport includes international aviation and maritime emissions. Public electricity includes heat generation. Dashed line indicates five year trend



Yet aviation is almost back to pre-COVID levels

Historical aviation emissions

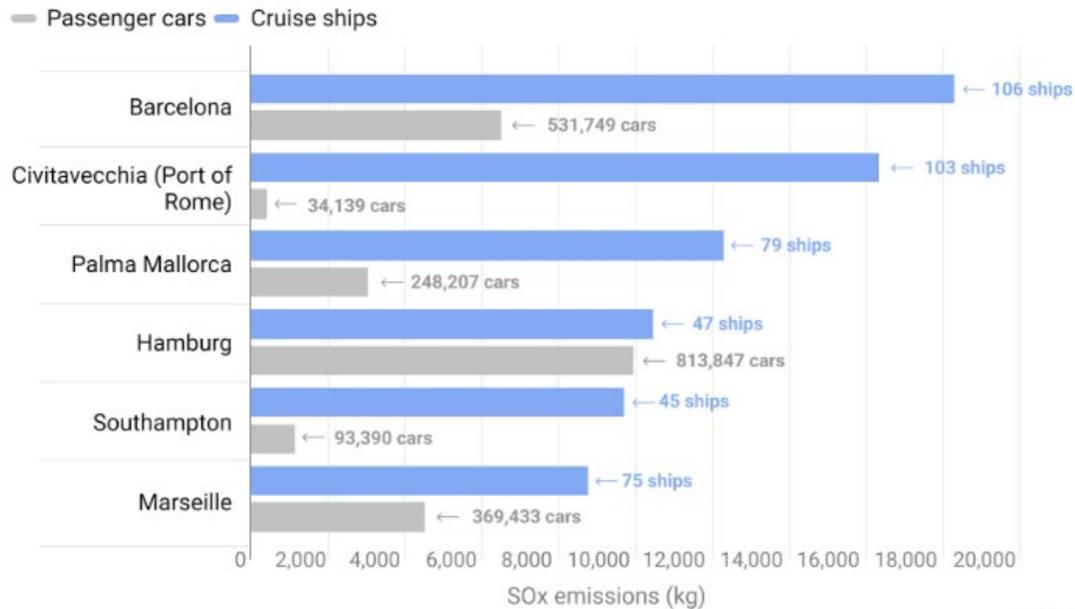


Source: T&E analysis, UNFCCC GHG inventories, Eurocontrol, EU ETSL



Cruise ships are getting bigger and bigger

Cruise ships polluted more than all the cars circulating key port cities

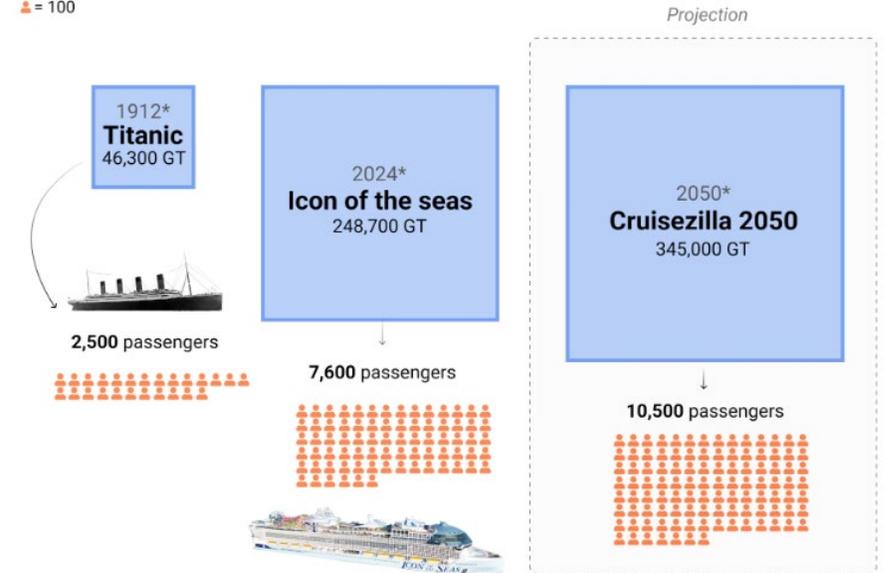


Source: T&E (2023)

The cruise ships of tomorrow will make the Titanic look like a fishing boat

■ Gross Tonnage (GT), size of the ship

▲ = 100

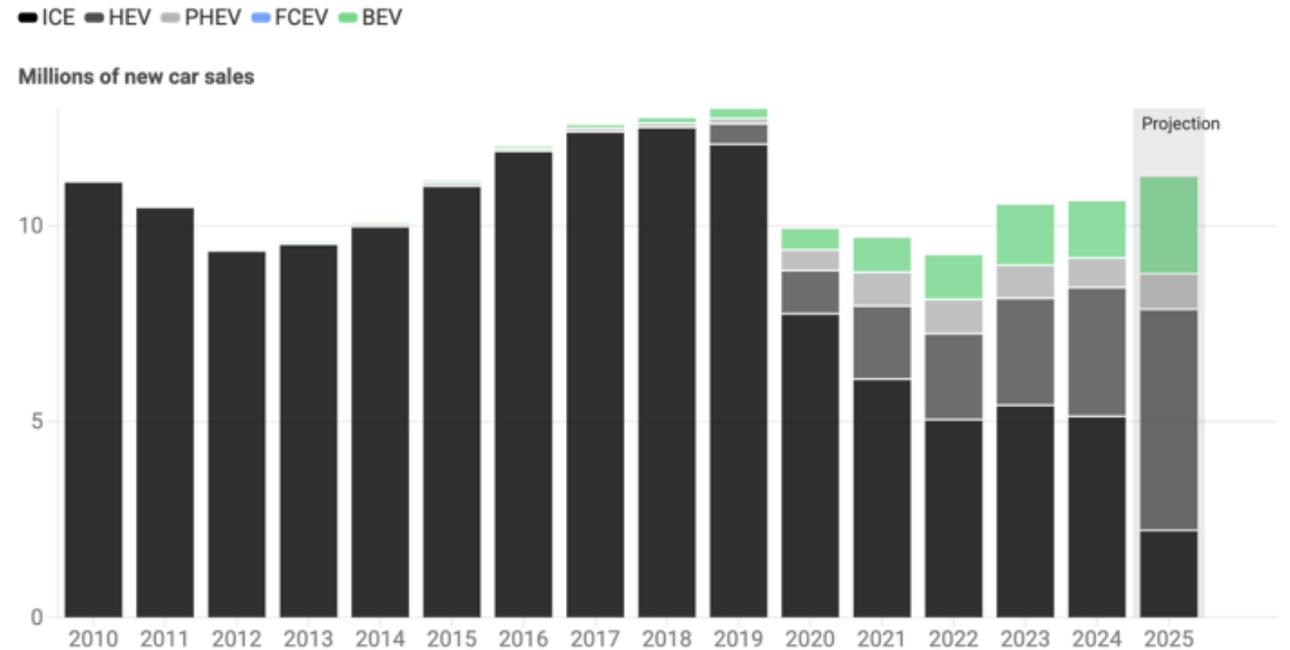


Sources: RMG and Clarksons. Images are not scaled. Rounded numbers for passengers. *Build year. Note: the data on gross tonnage and the number of passengers of the 2050 Cruisezilla ship is a result of a linear projection from the cruise ship growth to date. It assumes that the ships keep growing at the rate they have been growing in the past 20 years.



Peak combustion is behind us

Sales of combustion engine cars in the EU peaked in 2019



Source: EEA, ACEA, Global data. HEVs include full and mild hybrids



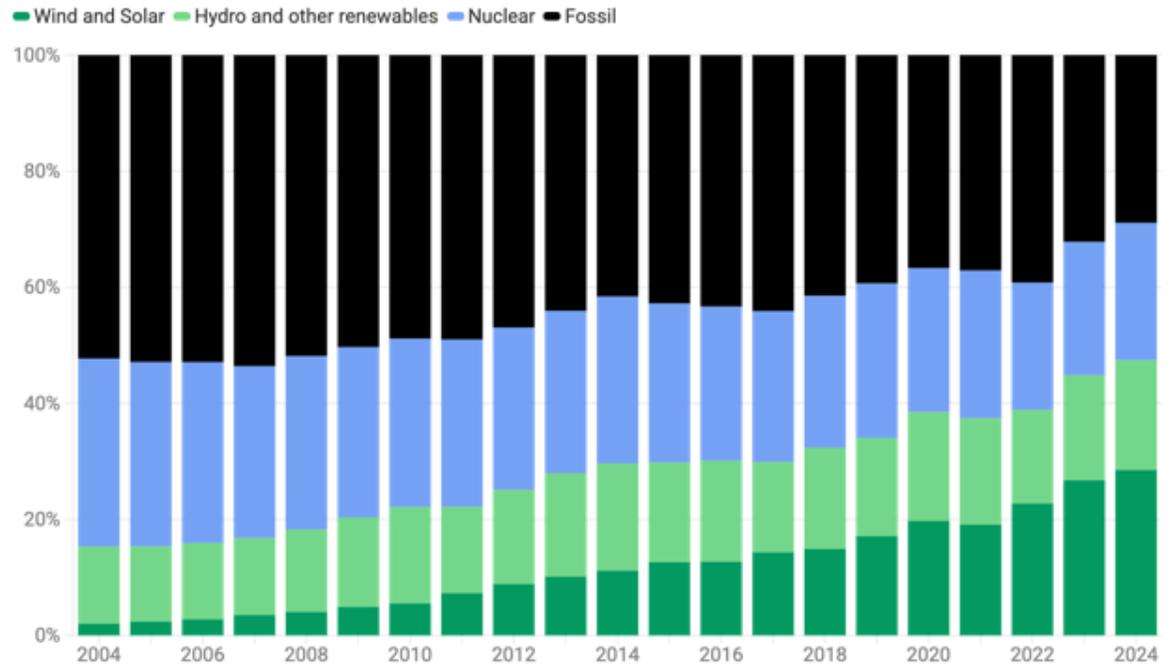
Electric transport powered by greener grid

Increasing renewables and electrification in lock-step

70%

Carbon free electricity generation in 2024

Share of EU electricity generation (%)



Source: Ember



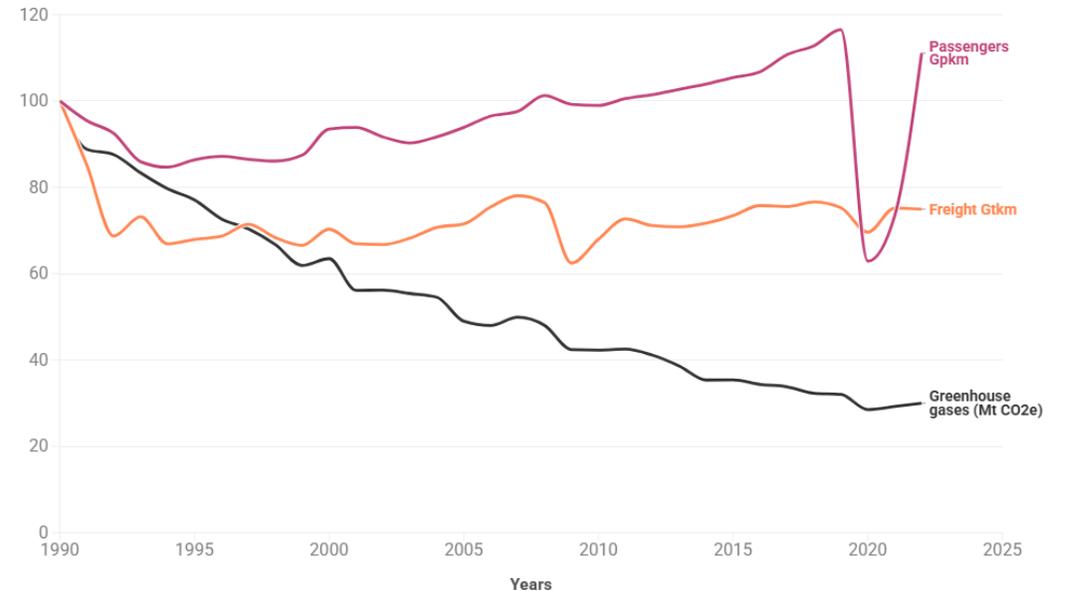
Train travel growth

From 1990 to 2019
passenger numbers were
up 16% while emissions
dropped 68%

EU rail emissions have plummeted while passenger activity soars

EU-27

Indexed values



Source: UNFCCC GHG Inventories, Stratas Advisors, [Statistical pocketbook 2024](#) (European Commission)



EU green transport policy overview



What is in place?

- Car CO2 standards
- Phase-out of engine sales in 2035
- Revised HDV standards

What is needed?

- Stick to 2035 ICE ban – no e-fuels
- Curbing the growth in car activity
- Electrifying corporate fleets

What is coming?

- ETS2
- Clean corporate fleet law

What is in place?

What is needed?

- Unlocking competition
- Improving ticketing
- Leveraging the existing infrastructure

What is coming?

- Action Plan for high-speed rail (HSR)
- Single Digital Booking and Ticketing Regulation

What is in place?

- SAF mandate (ReFuelEU)

What is needed?

- Cutting (corporate) flights
- Better pricing (fuel taxation, extended ETS coverage)
- H2 & electric aircraft
- More and better quality SAF
- Address non-CO2

What is coming?

- Sustainable Transport Investment Plan

What is in place?

- FuelEU Maritime
- Inclusion in ETS

What is needed?

- Accelerated shift to green H2-based marine fuels

What is coming?

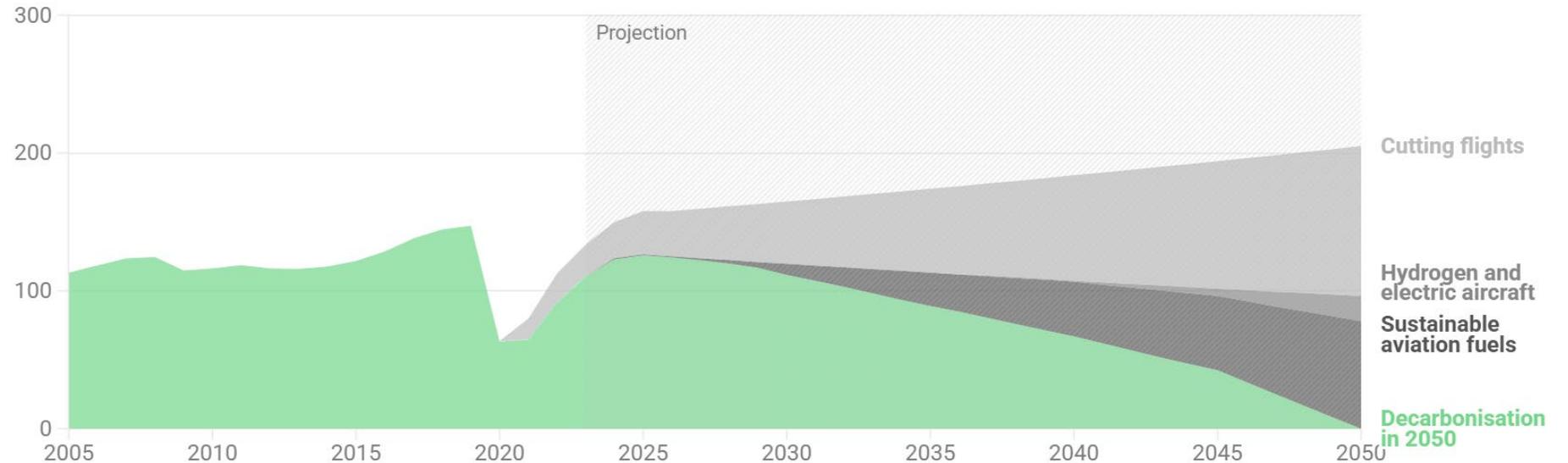
- Sustainable Transport Investment Plan



Focus: How to decarbonise aviation?



How to decarbonize aviation (MtCO₂)



Source: T&E modelling



Conclusions

- Technological solutions (electric vehicles and cleaner fuels) are crucial.
- But they're not a license to grow for the transport and tourism sector.
- We must also curb unnecessary travel and shift to sustainable modes. That means fewer planes, cars, and cruise ships, and more trains.
- Closer, slower, and more sustainable tourism is possible.

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OPENING PANEL



MODERATOR

Anouk van Eekelen
NBTC



SPEAKERS

Katrin Erben, Austria Tourism

Suzanne Hoadley, IRU

Françoise Guaspere, Île-de-France Region, NECSTouR

Gert Nieuwboer, SNP Naturreizen

Sacha Göddeke-Mulder, NS Dutch Railways

ACCELERATING THE TRANSITION TO SUSTAINABLE TOURISM MOBILITY



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Session 1. Rethinking Tourism Mobility Consumption

Room - Frontier - Fs 2.008

Session 2. Investigating Tourism and Transport Climate Risks

Room - Horizon North - Hn 2.018

Session 3. Exploring Business Model Innovation

Room - Horizon North - Hn 0.003

Session 4. Unlocking Data Exchange Potential

Room - Horizon South - Hs 1.027

Session 5. Developing Pathways for a Just and Ethical Transition

Room - Horizon South - Hs 1.030

ACCELERATING THE TRANSITION TO SUSTAINABLE TOURISM MOBILITY



EUROPEAN SUSTAINABLE TOURISM MOBILITY FORUM



MODERATOR

Attila Benedek
European Parliament



SPEAKERS

Ben Lynam, The Travel Foundation
Yogi Hendlin, Erasmus University Rotterdam
Teodora Marinska, European Travel Commission
Willem van der Deijl-Kloeg, Tilburg University
Celiane Camargo- Borges, Breda University of Applied Sciences

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FINAL KEYNOTE



Koert van Mensvoort
Next Nature



Thank you
for your participation



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