



Road to 2030

BELGIAN TRAVEL CONFEDERATION

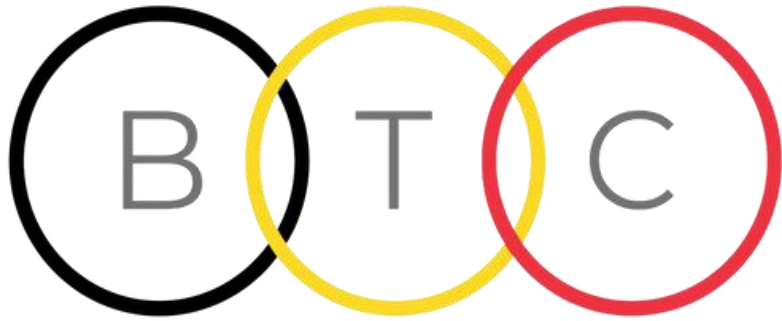
Anne-Sophie Snyers, CEO



Belgian Travel Confederation

#EUTourism





Belgian Travel Confederation



800+ Be Travel Agencies & Touroperators



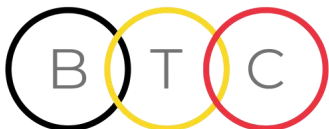
25+ Be Tourism offices

BATM

BELGIAN ASSOCIATION OF TRAVEL MANAGEMENT

200+ Be Travel Managers

- ❑ +1000 involved companies in 2024
- ❑ Goal towards the whole Belgian Travel & Tourism ecosystem in 2030



Belgian Travel Confederation

Belgian Travel & Tourism Market



70.000

People
60k+ in local
tourism area
10+ in outgoing
travel sector



**Be Federal
Learning account**

Mandatory as of
2024



**300
billion**

Turnover

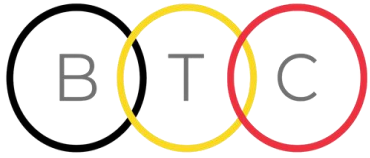


**Job
shortage**

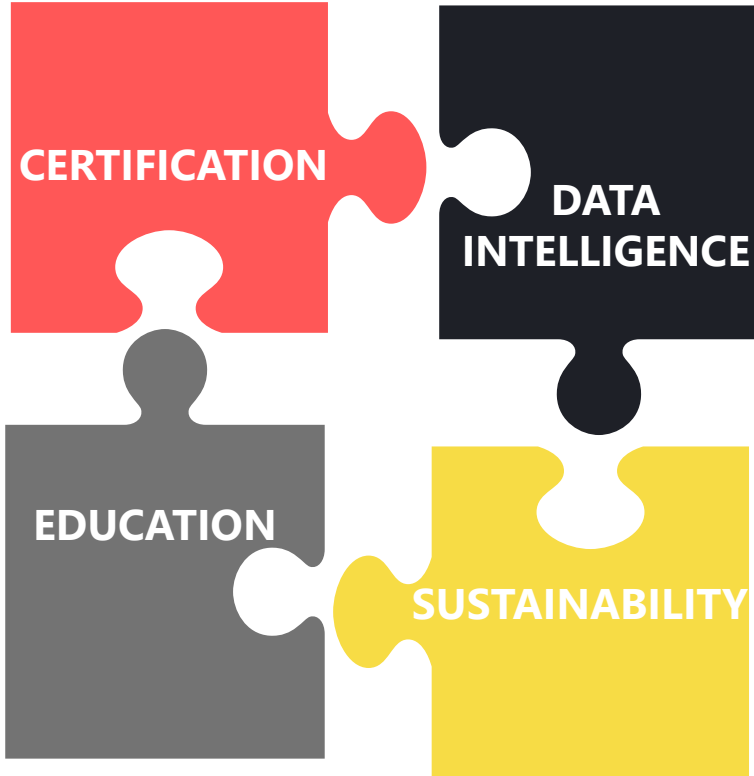
-15% compared to
2019 in Travel
agencies



**97,5%
SME**



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Feb 2022:

Transition Pathway for tourism

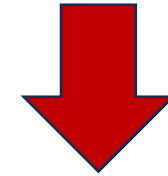


Apr 2022:

Belgian Travel Confederation

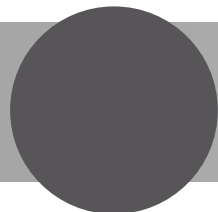
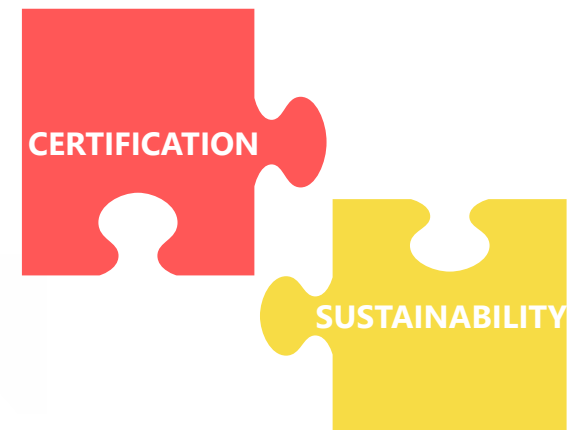


Jan-Jun 2024: Belgian Presidency at the EU Council



EU Agenda for tourism 2030
concrete workplan

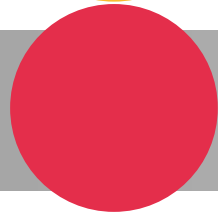
Pledge N° 8 - **Green transition** of tourism companies **-Travel agencies and Touroperators**



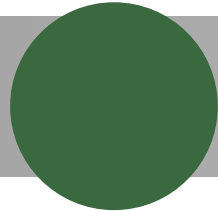
19 Criteria



Mandatory trainings



First steps towards sustainable business



CERTA GREEN = Travelife compliant



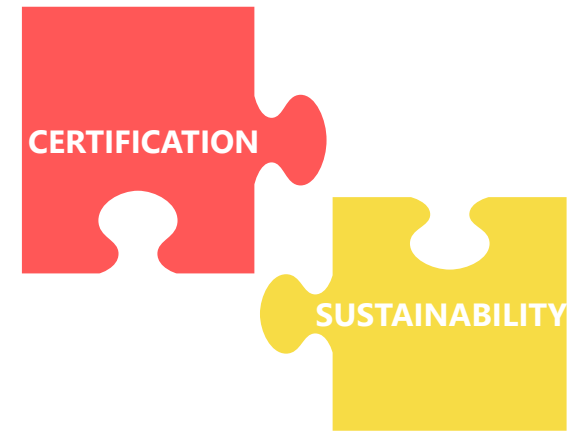
CERTA CERTIFIED TRAVEL AGENT






CERTA CERTIFIED TRAVEL AGENT
SUSTAINABLE



Pledge N° 8 - **Green transition** of tourism companies - **Travel agencies and Tour operators**



Targets

- 2024**  150 Be certified
- 2028**  300 Be certified & support from other stakeholders
- 2030**  60% Be Green CERTA certified



Lessons learned & actions

- **Many EU ecolabels but no EU label for tourism companies**
- **Support from the regions | EU | stakeholders | consumers → national Code of conduct**
- **Mindset change**

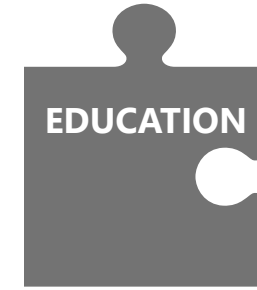
GOAL: SMEs informing customers with indicators about the environmental impacts of their travel, and assisting destinations in data-based destination management;

Pledge N°23: **Skills and stakeholders supports** – One-stop-shop for learning opportunities



Belgian
Travel
Academy

CE^{VO}
FO^{RA}



- ✓ **Reskilling – upskilling** – 56.000 in EU in 2022, out of which 1000+ in Belgium through the Belgian Travel Academy
- ✓ **Participation in the Pact of skills 2030 – EU platform in summer 2024**
- ✓ 5+ **Dissemination activities** planned in 2024 for the Erasmus+ project – Low carbon Travel



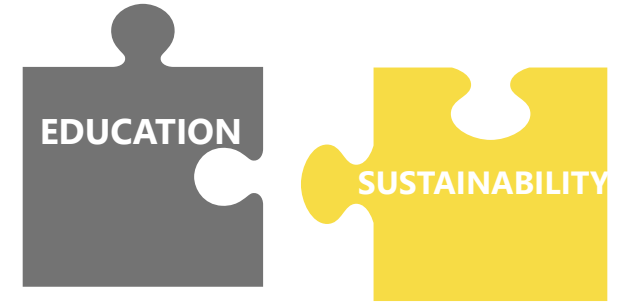
ATRE
AGIR POUR UN
TOURISME
RESPONSABLE
EUROPÉEN



Erasmus+
Enriching lives, opening minds.

Pledge N°23: **Skills and stakeholders supports** – One-stop-shop for learning opportunities

Targets



2024 → +1500 upskilled (+20%)

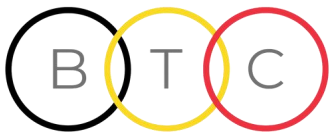
2028 → +2000 upskilled (+25%) & + 300 reskilled (job seekers)

2030 → Belgian Job deal implemented throughout the whole sector, SME's & locals included

EU Pact of skills: +10% annually

Lessons learned

- 1. Challenged communication between regional/national public/private federation i.s.o. training needs**
- 2. News skills to be learned & no time = e-learning & on demand format**
- 3. Upskill & reskill needed & lack of staff**
- 4. Inclusion of local stakeholders through the Be Regions**



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Pledge N°14 – Digital transition: Common European Data space for tourism



Travel Intelligence Report - 18 August 2023
Belgian travel market - YTD figures 2023

Current situation - Organised BE Travel Market YTD 2023

Turnover & Pax
Source: TravelNote Trends - year-to-date 2023 vs. previous years (bookings until 06/2023 - Week 26)

YTD 2023 vs. YTD 2022	+20 %	YTD 2023 vs. YTD 2019	+15 %
	+7 %		+28 %

Travel Forecast Model - Overall BE Travel Market Y2023

Number of trips (pax) & Retail value
Source: Euromonitor - #E residents domestic and outbound departures - forecast full year 2023 (revised data dtd 7/08/2023)

Total trips (pax)	37,1 mio	Retail Value	30,4 billion	Average Retail Value	818 €
	+10 % vs. 2022		+5 % vs. 2019		domestic 417 €
					outbound 936 €

Growth Source: Euromonitor - M: million / B: billion - forecast 2023 and 2024 - Trips & Retail Sales Price (RSP)

Category	2018	2019	2020	2021	2022	2023	2024	% Y23 vs. Y19	% Y23 vs. Y18
Domestic Trips	RSP 3,6 B	3,7 B	2,5 B	3,0 B	3,3 B	3,5 B	3,7 B	8%	4%
Domestic Departures	Trips 7,8 M	8,2 M	5,2 M	6,5 M	7,7 M	8,4 M	8,8 M	8%	2%
Outbound Departures	RSP 20,0 B	20,4 B	9,3 B	13,4 B	21,1 B	26,9 B	34,0 B	17%	32%
Outbound Trips	Trips 26,5 M	27,2 M	12,4 M	17,5 M	26,3 M	28,7 M	34,4 M	10%	0%

Top 5 Destinations Source: Euromonitor - Outbound departures per country

Inside Europe

- 1. FR 36%
- 2. BE 23%
- 3. SP 7%
- 4. NL 7%
- 5. DE 4%

Outside Europe (n=10,000)

- 1. TR 16%
- 2. MA 7%
- 3. US 5%
- 4. EG 3%
- 5. AE 3%

[Click here for Report Index & Definitions](#) www.belgian-travel-confederation.be contact: info@btc-travel.be



Travel Intelligence Report - 18 August 2023
Organized travel market - trends YTD 2023
Source: TravelNote Trends - Trend analyses ytd vs. historical figures (ca. 100 travel companies)

Time of booking - YTD 2023
Source: TravelNote Trends - Turnover for departures in 2023 vs. previous years (bookings until Week 26)

Booking window - YTD 2023
Source: TravelNote Trends - Booking window for departures YTD 2023 (bookings until Week 26)

Bookings per target group - YTD 2023
Source: TravelNote Trends - Bookings per target group for departures YTD 2023 (bookings until Week 26)

	YTD2023	YTD2022	YTD2021	YTD2019
Couples	54%	51%	52%	50%
Family	33%	30%	35%	32%
Group	2%	2%	2%	3%
Single	11%	12%	12%	15%

Top 5 Destinations Source: TravelNote Trends - share vs. total pax - YTD 2023

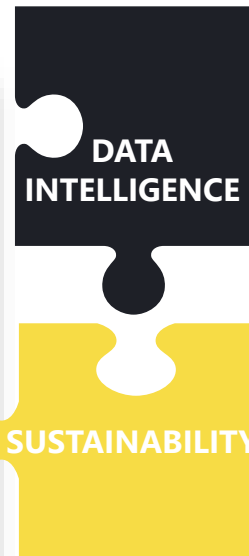
Short-Medium Haul

- 1. SP 19%
- 2. TR 8,5%
- 3. FR 8,2%
- 4. GR 6,5%
- 5. IT 4,8%

Long Haul

- 1. US 2,6%
- 2. CV 0,9%
- 3. MX 0,9%
- 4. AE 0,8%
- 5. TH 0,7%

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Anonymous data from 100+ companies (soon up to >500) out of 1000 Belgian travel companies

Data driven decisions for stakeholders and market insights based on real time data

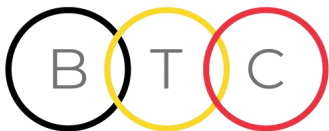
Targets

- 2024** → IT system set up & 4 publications – 10% statistics
- 2028** → 60%+ of real data from BE travel organizers | 25% included in a EU digitalisation program
- 2030** → Cross sector data use | 75% with active website

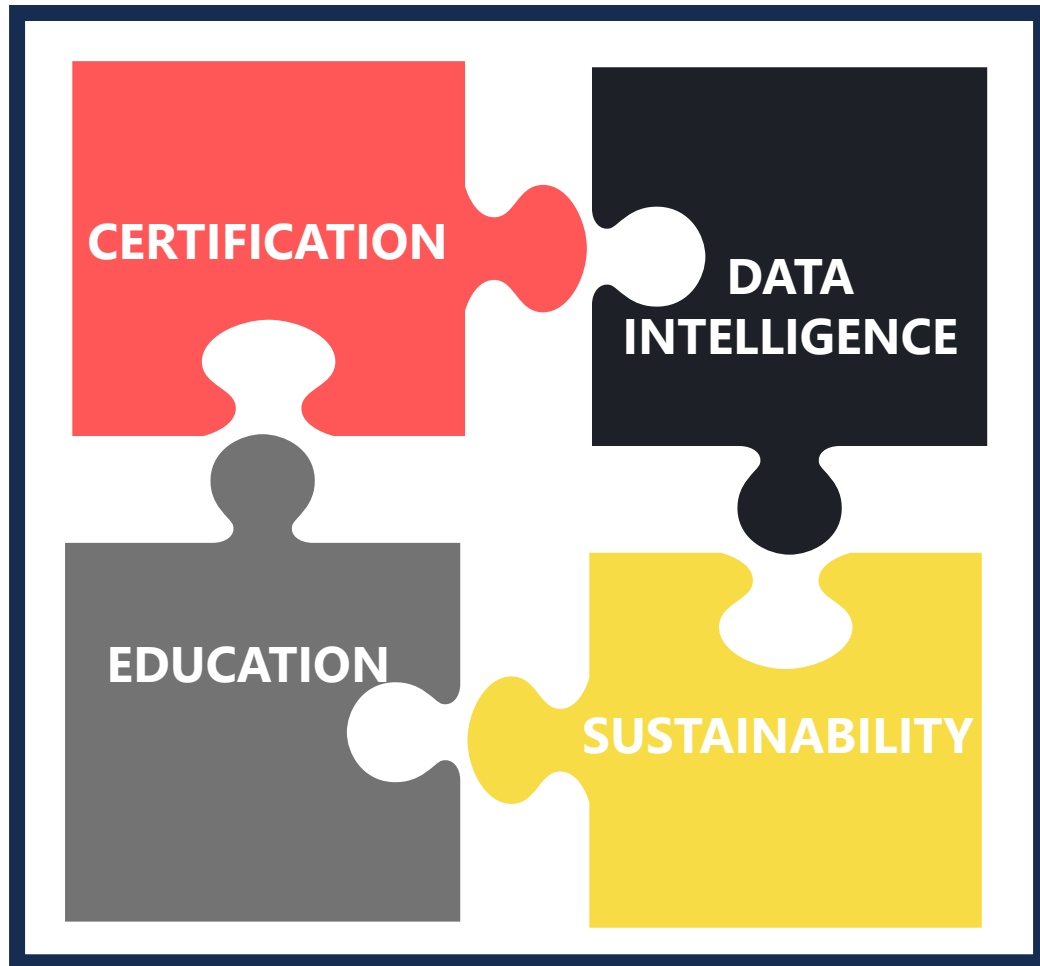
Lessons learned

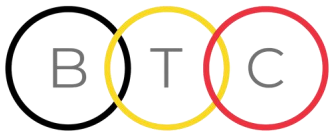
- **Data sharing/GDPR of Be travel behaviour**
- **One-stop-shop tool to gather & analyze real data**
- **Data Gouvernance ACT: cross sector data use**





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Lead by example



Who wants to be part of it?



And much more...