

The European Source Market to Asia-Pacific

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Market Snapshot

Strong Recovery Performance

European outbound tourism to APAC has recovered strongly, surpassing 2019 levels in several destinations.

Robust Connectivity

Approximately 850+ flights / day operate between Europe and APAC, reflecting strong connectivity growth.

Top Destinations

Top destinations for Europeans: Thailand, Vietnam, Japan, Malaysia, Singapore, China, Australia.

Growth Trajectory

Recovery trends: 2024–2025 growth of 20–25% YoY, with surge in summer 2025 bookings.

Travel Preferences

European travelers increasingly prefer longer stays (10–15 nights) and multi-country itineraries.



Top European Source Markets

Core Markets

Germany (25%), UK (20%), France (15%), Nordics (8%).

Emerging Markets

Emerging markets: Poland, Czech Republic, Spain, Italy, showing double-digit growth YoY.

Traveler demographics:

30–50 years old dominant;

“Silver tourism” segment 50+ growing for long-haul, luxury experiences.

Travel style:

Mix of leisure, culture-focused, and wellness travelers.

Opportunity:

secondary European cities are untapped, providing new route potential.





Connectivity – Flights Overview

Direct flights

Approximately 699 direct routes operate between Europe and APAC, with over 850 daily flights total (passenger & cargo).

European Hubs

Major Hubs: Frankfurt, London Heathrow, Paris Charles de Gaulle, and Amsterdam Schiphol serve as primary European gateways.

APAC Gateways

APAC Gateways: Singapore, Bangkok, Tokyo, Beijing, Shanghai, Hong Kong, and Sydney are key entry points into the region.

Airline Expansion

Cathay Pacific has increased its European connections, adding Munich and Brussels to its network in summer 2025.

IndiGo Airlines plans to launch direct flights from India to Athens, Greece, starting January 2026.



Flights Market Recovery & Growth Patterns

Regional Recovery

Europe – APAC traffic recovered faster than other long-haul regions.

Growth Trajectory

2024: +21% YoY growth;
2025 continues the upward trend, approaching the pre-pandemic peak.

Seasonal Patterns

Europe's summer holiday months (July–August) remain peak, but off-peak travel (April–June, September–October) is rising.

Traveler expectations: convenience, connectivity, value, and sustainable flight options.

Airlines are marketing **multi-stop itineraries** for cultural and experiential travel.



Connectivity – Cruise Overview

Cruise Market Size

The Asia Pacific cruise market generated USD 1,478.5 million in 2024 and is expected to **grow at a CAGR of 13.9%** from 2025 to 2030.

Cruise Types

Ocean cruises are **the largest revenue-generating segment**, while river cruises are the fastest-growing segment in the region.

Key Ports

Singapore, Hong Kong, Tokyo, Ho Chi Minh City, and Sydney are prominent cruise hubs.

European Cruise Lines

Companies like Viking Cruises and Princess Cruises offer itineraries connecting Europe with APAC destinations.

Market Potential

The Asia Pacific region shows significant growth potential for the cruise industry, driven by rising disposable incomes and a growing middle class.



Cruises Market Trends

Growth in long-haul immersive voyages: Passengers seek cultural and wellness experiences.

Multi-stop cruises are popular for high-spending European travelers.

Cruises **integrate shore excursions** in multiple countries: e.g., Vietnam, Thailand, Japan.

Seasonal patterns: repositioning cruises from Europe mostly spring and autumn.

Opportunity: ports in APAC can enhance tourism value capture by creating cruise packages.





Key Traveler Trends



Wellness & Nature

European travelers are increasingly drawn to Asian destinations offering wellness experiences and natural beauty.



Cultural Immersion

There is a growing interest in cultural and authentic experiences, with travelers seeking to engage with local traditions and cuisines.



Multi-Country Itineraries

Travelers are opting for multi-country trips to maximize their experiences, combining destinations like Thailand, Vietnam, and Japan.



Off-Peak Travel

There is a shift towards off-peak travel, with more Europeans choosing to visit APAC during shoulder seasons to avoid crowds and enjoy better value.





Key Traveler Trends – cont'd



Luxury & long-stay

50+ travelers seeking high-end, extended stays.



Booking behavior

OTAs, Travel Agency, Mobile apps, package deals, flexible cancellations.



Sustainable Travel

Growing demand for eco-conscious accommodations and experiences.



Technology as Resilience Tool

Creating personalized and adaptable experiences.





China Re-Opening

Flight Recovery

Direct flights from Europe to Beijing and Shanghai have indeed seen a significant recovery.

Visa Simplification

Simplified visas: 30-day visa-free for select European countries; easier transit visas.

Potential: tap both first-time European travelers to China and repeat visitors.

Multi-Country Integration

Chinese destinations integrated with SE Asia for multi-country itineraries.

Marketing Opportunity

Marketing opportunity: promote long-haul immersive experiences combining China and neighboring APAC countries.



China - A Core Destination for Global Travelers



Historical and Cultural Icon



Depth of Experience



Easy Accessibility with Visa-free



Unique Strengths of China Cultural Tourism



Top Bucket List Tourist Attractions

- ☐ The Great Wall
- ☐ The Forbidden City
- ☐ The Terracotta Army
- ☐ Yu Garden

Unique and Globally-known Spots

- ☐ Yangtze River
- ☐ Panda Base / Center
- ☐ Hangzhou West Lake



Barriers & Challenges

Cost Sensitivity

Airfare cost sensitivity: long-haul travel remains expensive; value perception crucial.

Visa Restrictions

Visa restrictions: China stricter than SE Asia; Japan/Thailand easier.

Geopolitical Concerns

Geopolitics & Safety: airspace closures, regional tensions.

Sustainability Awareness

Sustainability awareness: European travelers increasingly eco-conscious.

Mitigation

flexible bookings, responsible tourism offerings, transparent communication.



Opportunities for APAC Destinations



Airline partnerships

route promotion, connecting flights, secondary cities.



Luxury & experiential tourism

wellness retreats, cultural immersion, eco-lodges.



Digital engagement

OTAs, social media, dynamic packaging.



Sustainability branding

eco-friendly accommodations, low-carbon travel experiences.



Cruise expansion

develop port facilities, enhance shore excursions.



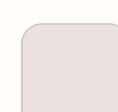
Secondary cities

offer authentic experiences away from traditional tourist hubs.



Multi-country packages

Marketing multi-country packages and long-stay options.



Highlight unique experiences

nature, culture, festivals, and luxury options.



Travel Trends Recap

01

Recovery & Growth

European travel to APAC has surpassed 2019 levels, with strong growth projected through 2025.

03

Traveler Expectations

European travelers prioritize wellness, cultural authenticity, and sustainable travel options.

02

Connectivity Expansion

Increased flight and cruise options enhance accessibility between Europe and APAC.

04

Strategic Opportunities

Destinations and operators should align offerings with these preferences to capture the growing European market.





About the TUI Care Foundation

- ▶ Building on the potential of tourism as a force for good, the TUI Care Foundation supports and initiates partnerships and projects which create new opportunities and contribute to thriving communities all over the world.

By connecting holidaymakers to good causes, it

- supports education and training opportunities for young people,
- promotes the protection of the natural environment in holiday destinations,
- and helps local communities to thrive sustainably and benefit from tourism.

- ▶ The TUI Care Foundation works globally and acts locally – it builds on strong partnerships with local and international organisations to create meaningful and long-lasting impact. The independent Foundation was initiated by TUI, the world's leading tourism business, and is based in the Netherlands.

- ▶ Various TUI entities worldwide collect customer donations on behalf of the TUI Care Foundation. Different TUI products and services also contain donations to the Foundation.

Key Facts and Mission Statement

Tourism-focused:

The TUI Care Foundation's activities build on the potential of tourism as global force for good

Charitable:

Registered charitable Foundation with positive international impact

Independent:

Governance and statutes guarantee independence from the business

Operational:

Foundation initiates strategically aligned projects with its partners and implements selected project on its own

Building on the positive impact of tourism, the TUI Care Foundation leads the way in protecting the natural environment and empowering lives in travel destinations.

TUI Care Foundation Programmes

Enabling Education Initiative



TUI ACADEMY



TUI JUNIOR ACADEMY

Empowering Communities Initiative



TUI FUTURESAPERS
PROGRAMME



TUI COLOURFUL CULTURES
PROGRAMME

Lively Landscapes Initiative



TUI FIELD TO FORK
PROGRAMME



TUI WILDLIFE
PROGRAMME



TUI FORESTS
PROGRAMME

Marine Conservation Initiative



TUI SEA THE CHANGE
PROGRAMME



DESTINATION ZERO WASTE
PROGRAMME



TUI TURTLE AID

TUI Sustainability Agenda

Tourism: A Force for Good

Our goal: Strengthening positive impact *and* reducing environmental footprint of tourism



TUI Sustainability Agenda



People

We will ensure that local people and communities benefit from tourism and the local supply chain.

We will empower a generation of changemakers by helping them acquire the new skills and knowledge they need to transform the tourism industry.



Planet

We will achieve net-zero emissions across our operations and supply chain by 2050 at the latest.

To protect our planet we will change the way we use resources, and become a circular business.

Emissions from
TUI Airline
- 24%

Emissions from TUI's
Cruise Business
- 27.5%

Emissions from TUI
Hotels & Resorts
- 46.2%

 **2030**



SCIENCE
BASED
TARGETS

DRIVING AMBITIOUS CORPORATE CLIMATE ACTION



Progress

Together with our partners we will co-create the next generation sustainable business model for the tourism industry.

We will enable our customers to make sustainable holiday choices at every stage of the customer journey.



Opportunity: What We Can Do

Leverage visa-free / easier entry policies	Adjust marketing to emphasise "no-visa / easy entry" perks. Make sure booking and info sites clearly mention which origins benefit.
Tap into second-tier & cultural-immersive travellers	Offer experiences beyond core attractions: local culture, food tours, nature escapes close to urban cores.
Target origin markets with fast recovery	For example, Spain, UK, German travellers are recovering well. Tailor packages for those markets.
Value + flexible booking	Flexible cancellation policies, value bundles, mid-tier / boutique offerings might attract Europeans wanting quality + value.
Improve urban infrastructure offerings	Good internet, transport links, digital payments, ease of getting around. Especially for first-time visitors. Chinese tourists expect familiar digital payment options, etc.
Seasonal/Off-Peak campaigns	Promote off-peak deals; extend stays (15+ days) since longer stays are becoming more viable with relaxed visa policy.



Thank you!

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