TUI GROUP

Package travel offers highest level of safety

POLICY AGENDA

July 2026 – EU edition

EU Tourism

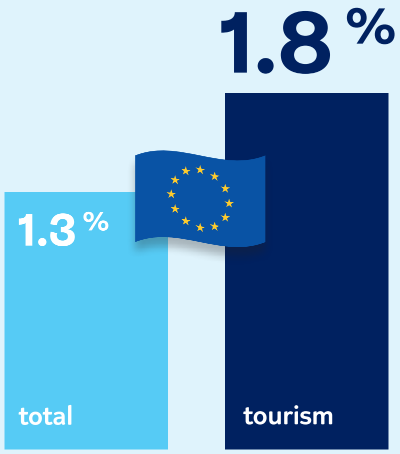
BOOSTING COMPETITIVENESS

Tourism accounts for 10 per cent of Europe's GDP and provides a livelihood for 25 million people. However, European tourism companies are under increasing pressure. EU regulations place an unfair burden on them compared to competitors from the US and Asia. A lack of infrastructure is hindering the green transition, while excessive bureaucracy is tying up investment funds. TUI highlights areas where changes are long overdue.

Tourism as a growth driver

Tourism in the EU has the potential to grow significantly faster than the economy as a whole. The prerequisite is the right framework conditions.

Forecast average annual growth rate 2025–2035:



Source: WTTC

Distortion of competition through unequal regulation

As a package tour operator, TUI provides comprehensive consumer protections under EU legislation, such as insolvency protection, support and repatriations during crises, and free cancellations in case of force majeure. Online platforms, particularly those operating from the US, are not subject to these requirements, even though they offer similar travel products. The same should apply to them as to short-term apartment rentals: anyone offering travel services commercially must be subject to the same tax and regulatory obligations as hotels and tour operators.

Visa hurdles hinder growth

Europe wants to become an attractive destination for travellers from all over the world, which is a worthwhile endeavour. However, lengthy bureaucracy is getting in the way: travellers from high-growth source markets such as China or India have to allow up to six weeks for their visas to be processed before their trip. In contrast, the United Arab Emirates, Thailand and Türkiye issue visas within days. This results in lost bookings and reduced value creation. Therefore, shorter processing times are also a matter of competition policy.

Aviation under one-sided cost pressure

Massive distortions of competition also prevail in air transport. For instance, the EU's mandatory blending requirement for sustainable aviation fuels (SAF) often places an additional burden on long-haul flights. Consider a flight from Amsterdam to Cancún, Mexico: while TUI must meet the costly SAF quota for the entire journey, non-European airlines with stopovers at hubs such as Istanbul or Dubai are only required to do so for the first leg. Furthermore, SAF is available in Amsterdam, but almost entirely absent in Palma de Mallorca or Heraklion. This makes fleet-wide decarbonisation planning virtually impossible. The EU must coordinate SAF obligations internationally and invest ETS revenues specifically in ramping up the market.

Expanding infrastructure

Sustainable energy is also set to transform the cruise industry. TUI Cruises has adapted to this, equipping all its cruise ships with green shore power, for example. But the problem is that most Mediterranean ports lack connections to green electricity, so expansion is urgently needed. Also electrification of TUI's ground transport in destinations is facing hurdles. In many destinations there is not sufficient green electricity available, grids are not adjusted and there is a lack of fast-chargers for heavy-duty transport.

Interview with Mirjam Chlouba

"WE ARE BRINGING ALL OUR GUESTS HOME"

February 2026: following the outbreak of the Iran conflict, the Gulf region closes its airspace. Thousands of TUI guests are stranded. Mirjam Chlouba heads the TUI crisis management team in Hanover. A conversation about situation reports, airlifts and the value of package holidays.

The crisis manager

Mirjam Chlouba is Director of Crisis Management GAS at TUI Germany and has headed the crisis management team since 2021. She joined the group in 1998 working in emergency support for the 1-2-Fly brand, has been a member of the group crisis management team since 2004 and has since managed situations ranging from the 2010 volcanic ash cloud and the coronavirus pandemic to the Gulf region conflict in 2026.

Ms Chlouba, 28 February 2026: when did you realise that this was a case for the crisis management team?

The first call came early on Saturday morning from Israel. We had guests there; there was an air raid siren. We got them across the land border into Egypt. Within a few hours, the entire airspace of the Gulf region was closed.

Nevertheless, TUI was able to fly guests out of the Gulf region. How was that possible?

In fact, the major hubs in Dubai and Abu Dhabi had come to a complete standstill; nothing was happening there at all. However, we knew that in Al-Ain, around 130 kilometres from Dubai, there is a small desert airport: one terminal, one baggage carousel, one kiosk. We sent our own aircraft there: they flew in empty and returned to Crete full of guests. From there, we were able to transport the guests home on scheduled flights. The organisational effort was enormous.

How did it work with the flight permits?

Given the general airspace closure, every single flight required a special permit. And as we also used aircraft registered in the UK, we had to obtain permission in advance to land within the EU. Ultimately, everything comes together in an operation like this: the airline, security, the on-site tour guides, and the hotels, which provided our guests with packed lunches for the small airport. Without this teamwork, we wouldn't have been able to get people home at such a pace. This teamwork is where TUI's strength lies.

Two TUI cruise ships were also in the region?

Two cruise ships from our Mein Schiff fleet were in the region when the hostilities began. Here too, our top priority was to fly out the approximately 5,000 guests as quickly as possible; we managed to do so by 17 March. The ships themselves remained in the region with a small crew afterwards because the Strait of Hormuz was impassable. It was only when a window of opportunity opened on 18 April that they left the region – in close coordination with the authorities.

An operation like this costs money. Who pays for it?

In a crisis, prices skyrocket – for charter flights as well as for hotel accommodation. We bear the bulk of these costs. Even though the legal obligation to cover hotel costs applies for only a few days: at TUI, we have never billed a guest in a crisis. Our guests can rely on that.

The TUI crisis management team

The 15 staff members of TUI Crisis Management and TUI Operations in Germany alone monitor all global destinations – around the clock. Every incident – be it traffic accidents, natural disasters or political crises – is classified according to a traffic light system ranging from green to red. In serious emergency situations, the TUI Crisis Management Team GAS, comprising around 40 staff members, as well as colleagues from across the Group in the airline, hotel, tour guide, IT, legal and communications departments, are systematically brought into the crisis management process. During the crisis in the Middle East, which triggered a red alert, thousands of TUI staff were deployed.

Why didn't TUI cancel trips to the region in advance?
My team and I monitor the security situation in our destinations around the clock. The travel advisories issued by the Foreign Office serve as the key legal guideline – particularly for cancellations, which are strictly regulated under package travel law. In this case, the travel advisory was not issued until around 6.30 pm on 28 February – by which time the air strikes were already in full swing. Our crisis team was already working flat out at that point.

Crises are becoming more frequent, not less. What does that mean for you and your team?
In twenty years, I have experienced five red alerts – the ash cloud, Covid-19, major waves of strikes, and now the Gulf region. The frequency is increasing. We are constantly investing in staff, systems and training. Crisis management is no longer an exceptional situation today, but a core competence in the global travel industry. This should also be recognised politically – in terms of consumer protection and in strengthening package holidays as a reliable form of travel.

Key crisis response on 28 February

8.00 am	Alert regarding air strikes against Iran – TUI organises land-based departures for guests in Israel
8.30 am	Information regarding airspace closures in the Gulf region – TUI enables free cancellations for trips to the affected areas
11.00 am	Determination of guest numbers – around 10,000 TUI Group guests are affected in the Gulf region alone
1.00 pm	First crisis meeting of the TUI GAS crisis team – initial information provided to guests on the ground – TUI actively cancels trips to the affected countries – first TUI guests, particularly those from the Far East who were due to transfer in the Gulf, are rebooked onto alternative flight routes
6.00 pm	Government travel warnings issued for all affected countries – TUI examines repatriation options

"Tonight we reached another important milestone in organising additional flight connections for our package holiday guests. From the smaller departure airport of Al Ain in the United Arab Emirates, we were able to establish a connection to Hanover via Heraklion with our medium-haul aircraft. I would like to express my special thanks to our colleagues from all five national airlines, who worked together to carry out the necessary safety checks for TUI Airline and then made flight planning possible in close coordination with the relevant authorities. At the same time, we would like to thank our guests for their patience and understanding during their return journey."

Sebastian Ebel
CEO of the TUI Group
8 March 2026

Middle East Conflict

A COORDINATED CRISIS RESPONSE

The escalation in the Middle East has also affected tourism in the eastern and southern Mediterranean. Türkiye, Egypt and Cyprus – key pillars of European outbound tourism – have, however, demonstrated a notable degree of resilience. Their handling of this difficult situation can serve as a blueprint for other destinations.

"The question for ministers and investors is not whether tourism will recover, but how quickly they will choose to enable it."

The World Travel & Tourism Council (WTTC) analysed four decades of global crisis data in May 2026. The result is clear: No major destination has ever suffered a permanent collapse – recovery is the norm, and its pace depends almost entirely on the quality of the political response.

What do these countries have in common? Their national authorities reacted swiftly and coordinated closely with major industry stakeholders, including TUI Group. In doing so, they have sought to put in place required conditions for recovery. Essential factors include:

- **Securing key flight connections:** the authorities are supporting airlines and tour operators in maintaining core international routes. Where required, targeted routing adjustments were implemented to avoid sensitive corridors, while safety considerations were fully respected without restrictions at all times.
- **Support measures for airlines:** governments have provided targeted support to airlines in particular. This includes flight incentives, temporary fee reductions and operational support. This enabled airlines to maintain competitive prices despite significant challenges and to stabilise the tourism ecosystem.
- **Making hotel operations flexible:** hotels across Türkiye, Egypt and Cyprus introduced flexible booking conditions, including extended cancellation windows and rebooking options, to provide additional flexibility to travellers.
- **Communicating proactively:** tourism authorities communicated quickly, clearly and professionally. Security measures were explained in detail, while timely updates and clarifications ensured transparency. These measures helped to avoid unnecessary cancellations and enabled booking decisions to be made on the basis of facts.

Book flexibly, travel safely

TUI's Dynamic Packaging combines individuality with full legal protection: travellers can flexibly combine flights, hotels and transfers – and are fully covered by the EU Package Travel Directive. Destinations can therefore look forward to welcoming guests who are directly supported by TUI in the event of a crisis. Source-market governments benefit too: as the package organiser, TUI is legally responsible for assistance and return transport – so repatriation does not rest with public authorities.

TUI: a reliable partner in times of crisis

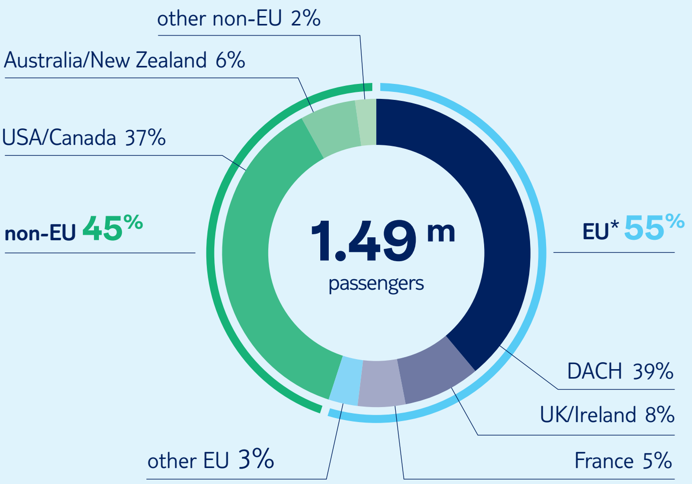
Türkiye, Egypt and Cyprus are managing the impact of the conflict in the Middle East through coordinated, targeted and pragmatic measures. Crucially, governments and authorities in these countries and regions are working in a spirit of trust with stakeholders in the tourism sector, such as the TUI Group. On this basis, we can help stabilise these destinations even in difficult times.

River Cruises

REGIONAL VALUE CREATION ALONG EUROPE'S WATERWAYS

The popularity of river cruises is increasing. Across Europe, around 1.5 million passengers have travelled on them in 2025, which is an eight per cent increase on the previous year. To ensure this growth continues and that Europe benefits from high-quality inbound tourism, ports, energy supplies and waterways now require public investment.

River cruises as a magnet for inbound tourism
Origin of passengers on European river cruises, 2025



** incl. UK; Source: IG River Cruise*

Europe's river cruises attract people from all over the world. More than half of these travellers come from North America, the United Kingdom, Asia and Australia. A key feature of this customer segment is their particular demand for high-end cruise offerings and authentic, local experiences. The local communities along the waterways benefit significantly as a result. For example, cruise passengers spend an average of around €30 per person on day trips along the Danube, primarily in retail and hospitality.

TUI is investing in Europe

TUI River Cruises, a UK-exclusive brand specifically tailored for the British holiday market, is part of this growth story and is expanding its offerings on the Rhine, Main and Danube, as well as on Dutch and Belgian routes. From 2027, TUI River Cruises will also operate in Portugal. A particular highlight is that the TUI Luzia, the brand's first newly built ship, will be deployed there. It was ordered from the Dutch shipbuilder Concordia Damen, who has also been awarded contracts for two further newbuilds. TUI River Cruises is therefore supporting the European shipbuilding industry specifically. The company is also committed to sustainability: the entire European fleet can use shore power in ports where it is available. From 2028 onwards, newbuilds are designed to run on alternative fuels such as methanol.

To ensure continued growth and strengthen regional value creation along the rivers, modern, environmentally friendly infrastructure is required. Key issues include:

- **Expanding mooring facilities:** At popular destinations, additional, reliable mooring options are needed. This will relieve pressure on popular tourist destinations and create capacity for new routes.
- **Promoting shore power:** The TUI River Cruise fleet in Europe is compatible with shore power. To enable ships to reduce their emissions while moored in port, the expansion of shore power facilities along the rivers is required.
- **Maintaining reliable waterways:** Navigation channels, locks and bottlenecks must be maintained and modernised. Reliable waterways are the foundation for stable timetables and long-term investment in modern river vessels.

Key economic factor

TUI River Cruises' Rhine-Moselle route, for example, calls at towns including Riol, Cochem and Bernkastel-Kues – communities for which tourism is a primary economic sector.

AI at TUI

EU TARGETS BECOME REALITY

With its ‘Apply AI’ strategy, the European Commission has set out a clear mandate: artificial intelligence is to be integrated more rapidly into strategic economic sectors. TUI is already putting this into practice in the tourism sector – not as a pilot project, but as an integral part of its corporate strategy.

AI potential in the EU

+8 % GDP growth in 10 years with widespread AI adoption

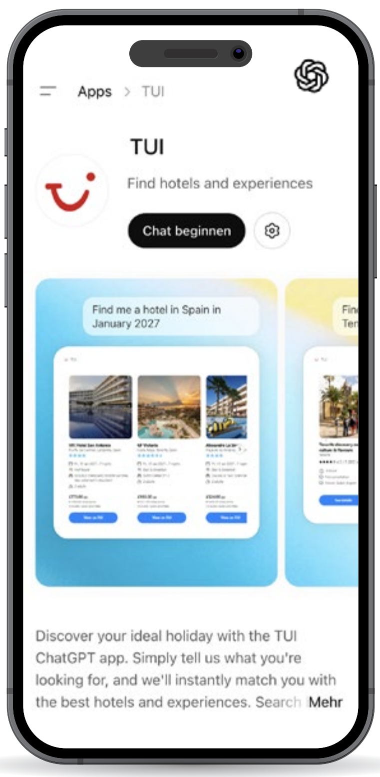
+€1.3 trillion in additional economic output

+4 % labour productivity

Sources: Implement Consulting Group/Google, Bank for International Settlements

As a European tourism group, TUI has clearly defined its goal: to become an AI-first company. The concrete implementation of the strategy is underway. AI prototyping teams from the technology division are working with internal experts to develop products, automate processes and integrate the technology into global platforms. For example, on 6 October 2025 Open AI announced plans to integrate apps into Chat GPT. Nine days later, the first TUI prototype was ready and a solution has been live since the end of April this year. Anyone using the TUI app in ChatGPT is offered suitable hotels, experiences and soon trips directly within the chat, complete with a booking link. Search queries from the UK, Germany and Scandinavian countries came in as early as the first week. This opens up an unprecedented channel for TUI with a potential 900 million weekly active users.

Pioneer
TUI was one of the first companies to integrate an app with ChatGPT



AI-powered travel companion

At the same time, TUI is working on an AI-powered travel companion for the post-booking phase. A new digital assistant links customers’ travel data with up-to-date local information, from restaurants to route planning between two destinations. Travel plans thus become dynamic, with personalised recommendations. Particularly valuable: the AI does not rely on static knowledge, but is fed with continuously updated real-time geodata. In this way, TUI provides reliable information and prevents the problematic ‘hallucinations’ of AI. The service launched in May and was developed in partnership with Google. It demonstrates how TUI is consistently integrating generative AI into its products.

Framework conditions must keep pace

TUI is also rolling out the AI approach internally on a broad scale: more than 8,000 employees have completed specific training on copilot applications in the workplace in the first four months of this year. Nevertheless, policymakers must support the rapidly growing range of AI applications. With the Apply AI strategy, Europe has taken an important step towards accelerating the application of AI in key economic sectors. What is now crucial is an innovation policy that strengthens European companies in the practical use of AI, enables opportunity-driven development and interprets regulatory requirements in such a way that they do not stifle innovation. Only in this way can Europe keep pace with the leading players from the US and China and establish its own European solutions in the market.

UN Tourism and TUI Care Foundation

BOOSTING RURAL TOURISM IN AFRICA

Tourism is one of Africa's key drivers of growth. The sector accounts for around seven per cent of the continent's GDP and supports millions of jobs. Yet much of its potential remains untapped. That is why UN Tourism and the TUI Care Foundation are launching a joint initiative to provide targeted support to rural regions and boost local value creation.

"This first call for proposals for the Tourism for Rural Development Small Grants, enabled by TUI Care Foundation, reflects our commitment to community-led tourism in rural areas. The awarded projects provide important local foundations for creatives and entrepreneurs in rural Africa. They not only advance economic empowerment but help us position tourism as a key driver for rural development."

Shaikha Alnuwais
Secretary-General of UN Tourism

Kick-off for the partnership: Thomas Ellerbeck, Chairman of the TUI Care Foundation, and Shaikha Alnuwais, Secretary-General of UN Tourism, in March 2026 at the signing of the joint initiative.

The project is unique: for the first time, UN Tourism is providing direct financing and technical support to five NGOs in four African countries as part of the Small Grants Programme, implemented in partnership with the TUI Care Foundation. The focus is on artisans. In addition to financial support, they receive practical assistance with product development, quality standards and marketing, targeting tourism as a key sales market. A look at the first five funded projects:

- **Mozambique:** Artisans in communities around Gorongosa National Park are being supported, with a particular focus on people with disabilities. More than 60 per cent of the participants are women.
- **Namibia:** Rooted in the indigenous Khwe community, the project strengthens traditional arts through training in product development and cultural storytelling. A cultural centre in Bwabwata National Park is being established as a hub.
- **Rwanda I:** Up to 100 participants – mostly young and female – are being trained in the visual arts and entrepreneurship. At the same time, they are gaining access to the tourism market to successfully sell their products.
- **Rwanda II:** The project combines nature conservation and tourism development in the Busaga Forest. Guided forest tours are planned, which will visit craftspeople, amongst others.
- **Tanzania:** Women and young people from the Maasai community are being trained in crafts and tourism services. The aim is to transform cultural heritage into economic opportunities.

TUI GROUP

At a glance

TUI GROUP IN EUROPE

TUI Group – business figures

Unique	integrated business model
34.7 m	customers traveling to 180 regions
24.2 bn	turnover
1.46 bn	operating result

TUI GROUP · TUI Cruises · HAPAG-LLOYD CRUISES · MARELLA CRUISES · TUI BLUE · ROBINSON · TUI MAGIC LIFE · RIU HOTELS & RESORTS · TUI SUNEO

TUI GROUP

YOUR CONTACT WITH US

Thomas Ellerbeck
Member of the Group Executive Committee of TUI Group and Chairman of TUI Care Foundation
thomas.ellerbeck@tui.com
+49 (0)30 60902060-60

Alexander Panczuk
Group Director Policy & Reputation of TUI Group and Managing Director of TUI Care Foundation
alexander.panczuk@tui.com
+49 (0)172 2814983

Corporate Office EU

Dr. Ralf Pastleitner
Director Public Policy Markets & Airline
Head of the Corporate Office EU
ralf.pastleitner@tui.com
+32 (0)2 3029870

Tim van Severen
Head of EU Tourism Policy,
tim.vanseveren@tui.be
+32 2 302 98 73

Napoleon von Sanden
Senior Manager
Public Policy Markets & Airline
napoleon.vonsanden@tui.com
+32 492 19 13 47

Monika Kopoczyńska
Head of Public Policy Aviation
monika.kopoczynska@tui.com
+49 (0)170 5669871

Corporate Office Destinations

Marie Vandeplassche
Head of Government Relations – Destinations (West Med & Long Haul)
marie.vandeplassche@tui.com
+34 (0) 663 730 656

Vincent Snauwaert
Head of Government Relations – Destinations (East Med & Long Haul)
vincent.snauwaert@tuifly.be
+32 (0)492 191331

Corporate Office Berlin

Bernd Hoffmann
Head of Public Policy
Head of the Corporate Office Berlin
bernd.hoffmann@tui.com
+49 (0)170 5666080

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