

ETC BULLETIN

Winter 2017-2018

ETC participating in High-level Conference at the European Parliament

On the occasion of World Tourism Day, on 27 September, the President of the European Parliament, Antonio Tajani, gathered MEPs, Commissioners and various important tourism stakeholders for a high-level conference on tourism - *A European strategy to enhance the competitiveness of the tourism industry, a key driver for job creation*. The event was the first of its kind, and thus marked a major development in the recognition of the tourism industry and its significant contribution to the EU in terms of job creation and growth.

The conference was opened with a poignant speech from President Tajani which highlighted the importance of job creation, attraction of investment, digitalisation and joint promotional activities within the sector. The President commented on ETC's



↑ President of the European Parliament, Antonio Tajani, opening the High-level Conference on Tourism. ©European Union 2017 - source: EP.

work in promoting Europe as a prime destination and the progress of the ETC initiative, *The European Tourism Manifesto for Growth and Jobs*.

ETC was also mentioned in President Tajani's conclusion,

within the framework of the 2018 EU-China Tourism Year, of which ETC is an implementing body, and the Parliament's adoption of policies for the promotion of tourism.

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“ In this increasingly competitive field, it is in our very best interests to join forces. In a way we are already doing this, through the work done by this Parliament and the Commission, in cooperation with many regional governments in the NECSTouR network and the European Travel Commission, and through the European Tourism Manifesto. ”

President of the European Parliament, Antonio Tajani

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→ ABOUT THE EUROPEAN TRAVEL COMMISSION

What is the European Travel Commission?

Since 1948 the European Travel Commission has been a state-of-the-art unique association in the public sector, representing European NTOs and promoting Europe as a tourist destination in long-haul markets. In the last several decades, ETC has positioned itself at the forefront of the European tourism scene. ETC has its headquarters in Brussels, where the Executive Unit is based.

What are ETC's activities?

ETC undertakes three basic activities: consumer advertising, market research and advocacy. ETC initiates marketing activities to promote pan-European products and themes which are complementary to the individual marketing actions of its members. Vital to ETC's activities are its Market Intelligence Group (MIG) and Marketing Group (MKG), formed by experts from member NTOs.

ETC also provides a forum for the directors of the European NTOs to meet regularly and exchange ideas, and it is in constant liaison with international organisations such as the UN World Tourism Organization (UNWTO), the Organisation for Economic Co-operation & Development (OECD), the European Tourism Association (ETOA) and the World Travel and Tourism Council (WTTTC).

Of particular importance is the ongoing cooperation between ETC and the European Commission, developed in the context of *Destination Europe 2020* to define a long-term strategy to promote Europe as a tourist destination. ETC is also mandated by the European Commission to play a key role in cooperative marketing campaigns.

Where does ETC operate?

ETC currently promotes and markets Destination Europe in four major overseas markets: Brazil, Canada, China and the USA. Each ETC Operations Group (OG) is formed by representatives of European NTOs operating in these markets to develop collaborations with the local industry.

Who are our members?

ETC members are the National Tourism Organisations (NTOs) of 32 European countries, including 24 EU member states. The NTOs of all sovereign states in Europe are eligible for full membership of ETC.

European Union: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain.

Others: Iceland, Monaco, Montenegro, Norway, San Marino, Serbia, Switzerland, Turkey.

Who are our associate members?

In accordance with its mission to strengthen the sustainable development of Europe as a tourist destination, since 2016 ETC has extended its membership opportunities to private organisations and academia, offering memberships based on public relations and endorsement, with the long-term aspiration of setting up a new unique forum in which public and private tourism stakeholders can cooperate to create benefits and eliminate disadvantages for the travel industry in Europe. Find more details on www.etc-corporate.org

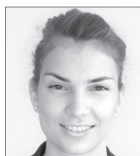
Our current associates: Amadeus, Emirates, Eurail Group, Expedia Inc., Global Blue, Sojern, STA Travel, Value Retail, Welcome Chinese.



Who is Who at ETC?



Eduardo SANTANDER
Executive Director



Teodora MARINSKA
Head of Finance and Public Affairs



Miguel GALLEGO
Head of Marketing and Communication



Jennifer IDUH
Head of Research



Iulia NICULICĂ
Operations and Administration Manager



Güneş VURAL
Digital Manager



František REISMÜLLER
Marketing Project Manager



Lyublena DIMOVA
Research Project Manager



Giulia ANDRIGHETTO
Office Manager

Our interns are: Michela Gusso (Italy), Elena Catavel (Romania), Sophie Mc Guirk (Ireland).

→ ADVOCACY

ETC and Europa Nostra join forces ahead of the European Year of Cultural Heritage 2018

In recent months, ETC has become more involved in increased cooperation with the heritage sector. With the European Year of Cultural Heritage 2018 fast approaching, it is now evident, more than ever, that tourism and cultural heritage are inextricably linked. Thus, ETC and Europa Nostra, the pan-European federation of heritage NGOs, have decided to capitalise on their long-standing relationship and join forces to create synergies and enhance collaboration. A memorandum of understanding was signed between the two organisations earlier this year, outlining a framework for joint cooperation and objectives. An agreement was made to promote Europe as a unique cultural tourist destination and to support the growth of the tourism industry while simultaneously protecting cultural heritage and maintaining its positive social and environmental impacts.



↑ European Heritage Alliance group photo at ETC Headquarters, Brussels, October 2017. © Europa Nostra.

Another area related to heritage in which ETC has been active is the European Heritage Alliance 3.3. The platform, coordinated by Europa Nostra, brings together over 40 European or international networks active in the wider field of cultural heritage. ETC had the opportunity to join this dynamic alliance this year and on 18 October had the pleasure of hosting the Alliance Meeting at its Executive Unit's office in Brussels. The meeting was attended by 29

members, and included a guest speaker from the European Commission's Directorate-General for Education and Culture, Erminia Sciacchitano. The discussion was focussed on the implementation of the European Year of Cultural Heritage and the opportunities for the members of the Alliance, including ETC, to actively take part in the activities, such as the European Culture Forum 2017 in Milan, when the European Year will be officially launched.

Miguel Gallego, Head of Marketing at ETC, also addressed the Alliance with a presentation about the EU-China Tourism Year 2018 and the opportunities available for Alliance members to become involved.

ETC looks forward to engaging in further collaboration with colleagues in the heritage sector in the framework of the European Year of Cultural Heritage 2018.

ETC participating in High-level Conference at the European Parliament

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President Tajani said: "I am thinking here of the host of pilot projects proposed by these MEPs: the preparation of the EU-China Tourism Year, and support for the European Travel Commission, UNESCO and the Cultural Routes."

Commissioner for DG Grow, Elżbieta Bieńkowska, spoke on the importance of funding for the competitiveness of tourism in Europe and the work being done with ETC, while MEP István Ujhelyi declared ETC as "one of the most important tourism

stakeholders in Brussels".

ETC President Peter de Wilde and Executive Director Eduardo Santander were also invited as speakers and discussed the necessity of visa facilitation and increased connectivity as factors to enhance tourism.

The event proved to be a major success for ETC and all parties involved, bringing tourism to the forefront of the EU agenda and consolidating its status as an essential sector within the EU.



↑ ETC President Peter De Wilde and Executive Director Eduardo Santander at the High-level Conference on Tourism.

➔ MARKETING ACTIVITIES

China Operations Group

How to travel in Europe? ETC advises Chinese travellers

In recent years, video has proven to be a powerful channel for information, education and entertainment, particularly in the travel and hospitality industry. Video is a powerful influencer and represents a major opportunity for destinations to reach a broad audience and inspire travel.

ETC China Operations Group has released a series of short animated videos with practical information and tips on how to travel in Europe. The video series titled 'Zhi Ouzhou' (literally translated as 'Go to Europe' or as a wordplay in Chinese 'Get to Know Europe') addresses the main



challenges and barriers that Chinese tourists, primarily Free Independent Travellers (FITs), face when planning a

trip to Europe. Each 90-second video tackles a different topic as identified by research conducted by ETC, namely:

how to get a visa for Europe, how to deal with money and tax refunds, how to travel around, and how to stay connected in Europe.

The video series is also meant to be a useful tool for Chinese travel agents selling travel to Europe. A second series of 'how to videos' will be released next year during the 2018 EU-China Tourism Year.

The video series was produced in cooperation with ETC Associate Members Global Blue and Eurail Group and is co-funded by the European Union. Watch the videos on www.youtube.com/visiteurope

Destination Europe Seminar 2017 held in Guangzhou

More than 12 million Chinese tourists visited Europe last year. Among various outbound tourism source market regions in China, Guangdong province is one of the most important. Being aware of its significance and potential, ETC decided to place a strong focus on the region and therefore hosted its Destination Europe Travel Trade Seminar 2017 in Guangzhou on 19 September. The seminar was organised in cooperation with Guangdong Province Tourism Association and supported by Finnair, Emirates airlines and the Czech crystal company, Preciosa.

Fourteen ETC Member NTOs, grouped in 7 pan-European clusters, presented their destinations to an audience of more than 70 operators and media gathered in the Soluxe Hotel Guangzhou. ETC Associate Members Welcome Chinese and Value Retail were also present. In addition to educating the travel trade and media about new transnational itineraries and products, the seminar served to present the upcoming 2018 EU-China Tourism Year.



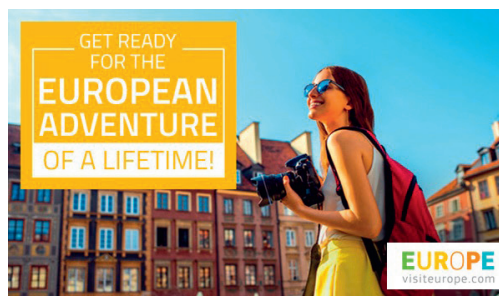
ETC Marketing Project Manager František Reismüller presenting the 2018 EU-China Tourism Year to the audience of the Destination Europe Travel Trade Seminar in Guangzhou.

USA Operations Group

ETC and STA Travel tap the potential of the US youth market

Youth travel is an important segment for the tourism sector, both in Europe and worldwide. Youth travellers are recognised as valuable visitors, seeking new and engaging experiences that go beyond leisure. They demand complementary ways to develop personal skills, social ties and cultural links.

ETC's research indicates that youth travellers from the USA engage in non-leisure activities. One in ten university graduates from the USA earned credit points abroad, half of them having studied in Europe. Destinations may benefit from building a relationship with tomorrow's travellers early on in their travelling careers.

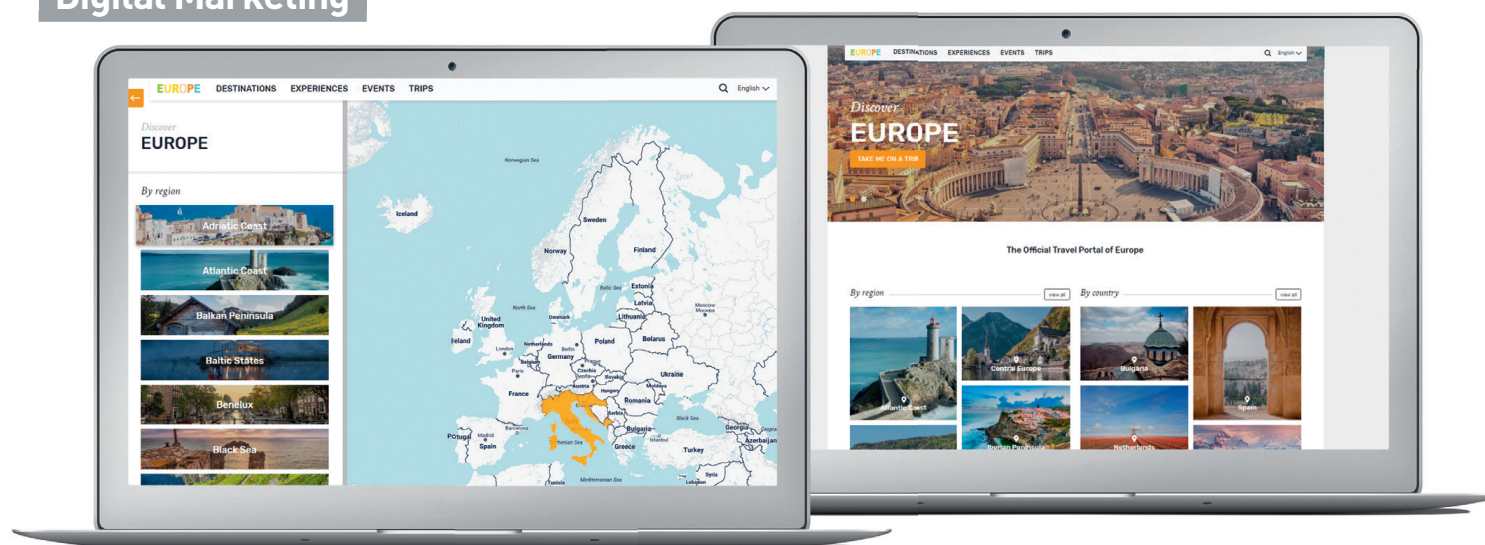


Based on this premise, ETC and its Associate Member STA Travel have been focussing on driving US passengers, specifically millennial and Gen Z travellers to Europe. Together, they rolled out an integrated campaign that highlighted a variety of activities in numerous European destinations. The two-month campaign included digital advertising (web and social media), trade engagement and sales incentives. A dynamic body of content

encouraged travellers to understand the benefits of travelling to and around Europe. The campaign delivered a 15% increase in passengers to ETC focus destinations.

Learn more about youth travel on www.etc-corporate.org

Digital Marketing



VisitEurope.com revamp

The second quarter of 2017 has seen the redevelopment of the VisitEurope.com portal based on the new marketing vision proposed in the Horizon 2022 strategy. The website, with its brand-new look, has been envisaged as a multi-purpose platform able to provide consumers with different insights on Europe.

While the old website was structured around the macro-regions of Europe, the shift of perspective towards a psychographic targeting has led

ETC to rethink the usability of VisitEurope.com and focus the attention on experiences and themes more relevant to the end-consumer. Important changes were made on the platform:

- *TastingEurope.com* was incorporated onto VisitEurope.com, with gastronomic events, recipes, products and routes forming part of the 'Experiences' section
- An innovative 'Inspire Me' section was added, aimed at proposing experiences and trips based on the preferences of consumers
- The 'Trips' section was improved and is now based on storytelling techniques that underline the importance of pan-European travel experiences
- A new feature was implemented which allows users to build their own trip based on content they have liked throughout the website and then display this as an interactive map in a dedicated personal space
- A new 'Events' section was also added, envisaged as an informative source that will

position VisitEurope.com as the main hub for events in Europe.

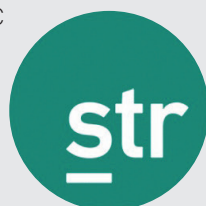
In addition, the platform will serve the ETC membership programme in displaying content from partners and members more vividly. It will provide more space for featured content and allow approved Partners and Members to directly upload information onto the platform through a new and innovative content management system. All this will strengthen the interaction with consumers in a highly engaging manner.

→ RESEARCH ACTIVITIES

ETC welcomes new data partner: STR Global

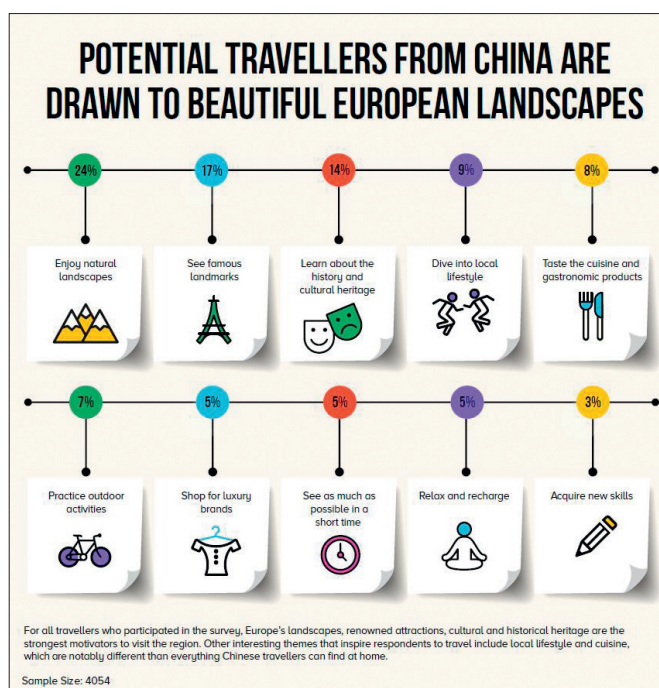
ETC is constantly striving to enhance data sources to provide member countries with access to a wealth of reliable data. As such, ETC is pleased to announce its partnership with STR Global, the leading provider of data benchmarking and analytics for the global hospitality industry.

The collaboration between ETC and STR Global is aimed at strengthening cooperation for successful research activities. This cooperation will not only involve data sharing from both parties, but also connect ETC and STR to further elaborate on issues of common interest (for example, travel facilitation, marketing and branding, forecasting and demographic change) and to share knowledge and best practices in tourism.



STR Global is the source for premium global data benchmarking, analytics and marketplace insights specialising in hotel performance, pipeline data, hotel supply, hotel market forecasting, hotel benchmarking, profitability, hotel demand and hotel data. Through more than 30 years of activity in the hospitality industry, STR Global has developed several benchmarking performance solutions, establishing market trend transparency and attracting investment capital to the sector.

New ETC infographic How do potential travellers from China foresee their next trip to Europe?



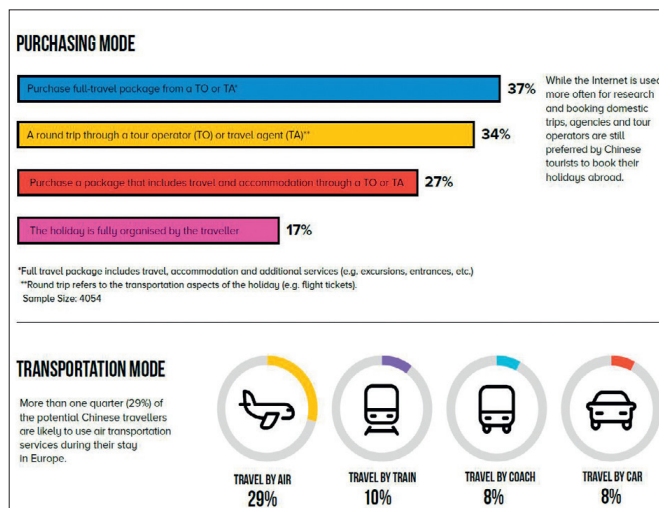
China is a key source market for tourism destinations in Europe. The region currently attracts 12% of all Chinese outbound travel.

The Chinese travel market is maturing and becoming more diverse.

An expanding middle class, improved air connectivity, easier visa procedures and more Chinese-friendly destinations are some of the factors set to support the surge in travel over the next few years. It is important, however, to understand that the Chinese travel market is not only growing, but also maturing and becoming more diverse.

The latest issue of the *Long-Haul Travel Barometer* delves into the profile of potential visitors from the Chinese travel market. It reveals how they prioritise different aspects of travel (for example, choice of transportation, travel companion), their destination preferences, experiences sought and barriers to travelling to Europe.

The report is available in the research section of www.etc-corporate.org





Tracking multi-destination travel in Europe from long-haul source markets

Europe is acknowledged as the world's number one tourist destination with a record figure of more than 620 million arrivals in 2016.

Europe is composed of countries which are each characterised by individual histories, landscapes and cultures. Supported by a highly competitive "ease of travel" thanks to improved air connectivity, low-cost flights and accommodation, it is unsurprising that the 'European experience' is based on visiting several destinations at once. A thematic travel approach, which allows tourists to visit different countries in a

multi-destination trip, can capitalise on the benefits that Europe has to offer and provide today's new generation of long-haul travellers with the most effective and rewarding travel experiences.

ETC is currently investigating multi-destination travel patterns of travellers from the US, Japan, China and India. Aimed at supporting the work of NTOs across Europe, the study will deliver comprehensive information on the spatial movements of long-haul tourists in Europe and foster collaboration among European destinations for the promotion of pan-European tourism products.

New study! Chinese outbound travel flows in EU

Under the framework of the 2018 EU-China Tourism Year, ETC has published the study *Chinese Outbound Travel Flows in the European Union* with the purpose of providing an overview of the current state and future prospects of the Chinese outbound travel market.

In addition, an analysis of the opinions of Chinese internet users as expressed in social media, focussing on travel to and within Europe, provides contextual qualitative information on travel themes and tourist behaviours trending in conversations. The aim is to characterise empirically the attitudes and opinions of current and prospective Chinese travellers. ETC believes that such content would particularly strengthen knowledge of the Chinese market by sourcing real travellers' opinions in a natural and unbiased way.

The report is part of Partnerships in European Tourism (PET), an EU initiative aimed at supporting EU tourism businesses and operators wishing to expand their businesses into the Chinese and US markets. Find out more at www.eutravelpartnerships.org

The report is available online on the [official page](#) on 'Law and publications' of the European Union.

The 13th TOURMIS Users' Workshop and International Seminar on Residents' Attitudes Towards Tourism


On 8 September, MODUL University Vienna hosted the International Seminar on Residents' Attitudes Towards Tourism, jointly organised by European Cities Marketing (ECM), the European Travel Commission and the World Tourism Organization (UNTWO).

The seminar gathered a wide array of practitioners and academics ready to share their expertise - ETC and UNWTO members, destination management organisations, researchers, consultants, and industry professionals. The overall aim of the event was to understand and quantify the problems generated by mass tourism and the impacts on residents following its sharp growth in the past years. The event proved to be an excellent platform for the exchange of best practices on future research projects and planned strategies among destination management organisations. The seminar was preceded by a full-day workshop on the use of the Marketing Information System (TourMIS).





Family picture of the 13th TourMIS workshop.


→ ETC MEMBER ORGANISATIONS

- **Austria**
Austrian National
Tourist Office (ANTO) 

- **Belgium**
Flanders:
Visit Flanders 
Wallonia:
Wallonie
Belgique
Tourisme (WBT) 

- **Bulgaria**
Bulgarian Ministry of
Tourism 

- **Croatia**
Croatian National
Tourist Board (CNTB) 


- **Cyprus**
Cyprus Tourism
Organisation (CTO) 


- **Czech Republic**
CzechTourism 

- **Denmark**
VisitDenmark 

- **Estonia**
Estonian Tourist Board -
Enterprise Estonia 

- **Finland**
Finpro ry 


- **Germany**
German National
Tourist Board (GNTB) 

- **Greece**
Greek National Tourism
Organisation (GNTO) 

- **Hungary**
Hungarian Tourism
Agency. 

- **Iceland**
Icelandic
Tourist Board 


- **Ireland**
Fáilte Ireland
Tourism Ireland Ltd. 


- **Italy**
The Italian Government
Tourism Board 


Associate Members: Amadeus, Emirates,
Eurail Group, Expedia Inc., Global Blue, Sojern,
STA Travel, Value Retail, Welcome Chinese

- **Latvia**
Investment and Development
Agency of Latvia (LIAA) 


- **Lithuania**
Lithuanian State
Department of Tourism 


- **Luxembourg**
Luxembourg for
Tourism (LFT) 


- **Malta**
Malta Tourism Authority
(MTA) 


- **Monaco**
Monaco Government
Tourist and Convention Office 

- **Montenegro**
National Tourism
Organisation of Montenegro 


- **Norway**
Innovation Norway -
Visit Norway 


- **Poland**
Polish Tourist Organisation
(PTO) 

- **Portugal**
Turismo de Portugal,
I.P. 


- **Romania**
Romanian Ministry
of Tourism 

- **San Marino**
State Office for
Tourism 


- **Serbia**
National Tourism
Organisation of Serbia (NTOS) 

- **Slovakia**
Ministry of Transport and
Construction of the Slovak Republic 

- **Slovenia**
Slovenian Tourist Board 

- **Spain**
Turespaña - Instituto de
Turismo 

- **Switzerland**
Switzerland
Tourism 

- **Turkey**
Ministry of Culture and
Tourism 

ETC AGENDA 2017-2018

16-17 November
International Seminar on
Transnational Tourism
Themes and Routes
Santiago de Compostela, Spain

22-24 November
ETC Board of Directors #86
and General Meeting #94
Budapest, Hungary

28 November
European Tourism Day 2017
Brussels, Belgium

19 January
2018 EU-China Tourism
Year Opening -
Business Summit
Venice, Italy

26-28 January
The New York Times
Travel Show
New York, USA

1-3 February
3rd Annual Meeting of the
ETC Market Intelligence
Group (MIG) and Marketing
Group (MKG)
Vilnius, Lithuania

6-7 March
Partnership in European
Tourism conference and
B2B: Europe's Culture and
Pan European Itineraries
Berlin, Germany

CONTACT ETC

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