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Dear friends of the European Travel Commission,

I look back to 2015 with a sense of accomplishment. It was a year of growth for ETC, both in membership and in fields of activity. Compared to the beginning of the year, ETC is today a more open and inclusive body, with an increasingly ambitious scope of work.

There are two main changes that will leave a mark and make us remember 2015 as an important year in the development of ETC. Firstly, the organisation embraced advocacy – defined as creating advantages and removing disadvantages for the tourism sector in Europe – as one of its main areas of action. Addressing the issues affecting Europe’s visitor economy would have been impossible without the input of the private sector, therefore the organisation established an associate membership programme, open for private companies and academia. This second major change has brought four new members to ETC already in 2015 – Amadeus, Global Blue, Expedia and Emirates.

Being an umbrella association uniting the NTOs of the European countries, and having the expertise of its private sector members, ETC is in the right position to appeal to policy makers and help them make the right decisions for Europe’s visitor economy.

Addressing the challenges affecting the European tourism sector has always been at the core of ETC’s mission. When the organisation was created in the aftermath of WWII, the aim of its founders was to support inbound tourism from the US and so help the European economy get back on its feet. For many years after its establishment, ETC focussed exclusively on marketing Europe as a tourism destination in the United States. In the 80s the organisation acknowledged the emergence of new markets, such as Japan, and expanded its operations worldwide. But the tourism sector in its global competitive environment has profoundly changed during the last decade.

Even though Europe is still the world’s number one tourist destination, the Old Continent is facing increasing global competition from emerging destinations that are attracting increasing numbers of tourists. Nowadays we cannot look at promoting Europe as the only way to shift this trend – the competitiveness of the tourism sector is affected by a number of factors, starting with brand positioning and ending with visa regime.

Being an umbrella association uniting the NTOs of the European countries, and having the expertise of its private sector members, ETC is in the right position to appeal to policy makers and help them make the right decisions for Europe’s visitor economy.

In a similar way to how the organisation has evolved in the past, ETC is, today, moving towards a more comprehensive approach that goes beyond the operational and into the strategic. As you read through this report you’ll see how we have begun to achieve the very first results of this new alignment in 2015.

Peter De Wilde
ETC President
The Executive Unit has seven full-time employees in three main departments – Marketing and Communication; Research; Finance and Administration. Every year, ETC includes a number of trainees – students with a strong background in tourism who were given the unique opportunity to gain work experience along with a privileged insight into European tourism.

The Executive Unit works on basic principles of integrity, respect, teamwork and adaptability to dynamic environments. In 2015, the Executive Unit was proud to include staff members and trainees from 8 different countries – Austria, Belgium, Bulgaria, Germany, Romania, Slovakia, Spain and Turkey.

The following trainees joined our team during 2015:

- Lyublena Dimova
  UCF Rosen College / iSCTE University Lisbon

- Zuzana Helikova
  King’s College London

- Johannes Siter
  University of Applied Sciences bfi Vienna

- Yasemin Volders
  University of Antwerp

ETC Executive Unit

- Eduardo Santander
  Executive Director

- Teodora Marinska
  Head of Finance and Public Affairs

- Miguel Gallego
  Head of Marketing and Communication

- Stefanie Gallob
  Head of Research

- Iulia Niculica
  Administration Project Manager

- Güneş Vural
  Project Manager - Online Marketing

- Jennifer Iduh
  Research Project Manager
The past year marked the sixth consecutive year of growth for the European tourism sector. European destinations recorded a record number of 609 million international tourist arrivals, resulting in a positive increase of 5% - well above the region’s long-term trend. Thereby the sector proved its strong resilience, withstanding the turbulence that emerged from the geopolitical and economic environment. Despite these challenges, Europe secured its position as the world’s number one tourist destination.

Along with the strong performance of the sector, ETC continued its solid cooperation with the European Commission, which awarded the organisation a third grant covering 2015. This cooperation agreement ensured the continuity of the activities carried out by the organisation during the previous grant periods under the Destination Europe 2020 initiative. At the core of this initiative lie the stimulation of competitiveness and the promotion of sustainable growth of the European tourism sector by raising awareness of Destination Europe in long-haul markets mainly through our revamped VisitEurope.com portal.

Based on valuable research results, in 2015 ETC focussed on strong digital marketing efforts, as well as on functionality enhancements and content enrichment of the VisitEurope.com portal. Following a series of successful online advertising campaigns to promote inspirational pan-European experiences in key target markets, ETC positioned the portal and its associated media handles as primary sources of inspiration for potential travellers to Europe.

ETC’s long-lasting efforts of gathering intelligence on Europe’s key overseas markets continued throughout the last year. ETC monitored the awareness and demand for European destinations as well as intention to travel to Europe in key long-haul markets. This led to the comprehensive understanding of Destination Europe’s competiveness and perception as an aspirational destination.

Last year laid the foundations for the improvement of public-private partnership cooperation on local, regional and national levels. The joint presence of the European Commission and ETC at key European and international events brought together leading public and private tourism stakeholders to discuss cooperation opportunities at all levels for the joint public-private promotion of Europe as a tourist destination.

2015 also saw ETC building strong new partnerships with important European and international organisations in the field of tourism such as ACI Europe, Eurail Group and the European Academy of Chinese Speaking Tour Guides (EACSTG). This Annual Report outlines a number of initiatives that supported these partnerships and greatly contributed to improving the experience of foreign visitors to Europe.

The Memorandums of Understanding that ETC has signed with major European and international organisations, its continuous cooperation with the European Commission, its valuable marketing and research efforts, its advocacy agenda as well as its unique mission have all enabled the organisation to better respond to the needs of its members and to strategically position itself as an important European institution in the field of tourism.

Looking ahead into the future, ETC will build upon these excellent results and continue to focus on raising awareness of Destination Europe. Happy reading!

Sincerely,
Eduardo Santander
ETC Executive Director
TOURISM TRENDS

European Tourism 2015: Performance and Outlook for 2016

2015 was yet another year of positive results for the European tourism sector. With 609 million tourist arrivals (UNWTO) the region experienced growth in international visitor numbers for the sixth consecutive year. Amidst the migration crisis and despite safety and security challenges, tourists continue to travel and tourism flows to Europe increased +5% on top of a good performance in 2014.

The majority of ETC destinations reported growth above the regional performance. Stellar performance was reported by Iceland (+30%), Romania (+17%), Slovakia and Montenegro (both +16%), Ireland (+14%), Slovenia (11%) and Serbia (10%). Factors that contributed positively include: the recovery of major source markets especially within Europe, favourable exchange rate movements, low oil prices and continuous marketing and promotion efforts outside the travel peak seasons.

Furthermore, strong growth was reported from Europe’s key markets overseas. Representing 5% of the region’s total inbound travel, arrivals to Europe from the United States grew by +11% in 2015. The upswing of the economy, a strong US dollar, stable air fares and an ever-increasing consumer confidence boosted travel to Europe. ETC expects the market to grow on average +6% a year through to 2020.

Similarly, travel from China shows no signs of stagnation. The economic slowdown failed to deter Chinese tourists’ enthusiasm to travel internationally with arrivals increasing by +30% in 2015 and peaking now at 12 million.

On the downside, the influx of tourist arrivals from Russia continues to fall. The plunge in travel flows were the result of political and economic instability, extended EU sanctions, falling oil prices and the depreciation of the rouble against key trading currencies. A recovery of this market is not expected in the immediate future.

For 2016, ETC expects tourist flows to Europe to grow between 3.8% and 4.4%, however, darker clouds are gathering on the horizon. While the impact of recent negative events on travel sentiment in overseas markets was relatively weak as confirmed by the ETC Long-Haul Travel Barometer, three-quarters of European travel may be compromised due to cross-border restrictions. Such upheld impositions may reduce arrivals by 2% per annum in future.

The European Tourism Sector - Impact of Tourism on European Union Economy in 2015 (total contribution)
International Tourist Arrivals by European Subregion in 2015

For 2016, ETC expects tourist flows to Europe to grow between 3.8% and 4.4%.

Source: ETC Executive Dashboard, UN World Tourism Organization (UNWTO) and World Travel and Tourism Council
The Market Intelligence Group in 2015

Chairman: Peter Nash (Ireland)
Vice-Chairperson: Emoke Halassy (Hungary)
Co-ordinator: Stefanie Gallob, ETC Executive Unit

Membership

The Market Intelligence Group (MIG) brings together the Research Directors of ETC’s 32 National Tourist Office (NTO) members in Europe. An important event in the calendar of the MIG is the group’s annual meeting held with the aim of establishing new research programmes for the upcoming year.

MIC Meetings

The Market Intelligence Committee (MIC) comprises a group of volunteers from the research departments of nine of ETC’s NTO members. The MIC gathers four to five times per year and, in 2015, four meetings were held in Brussels and Vienna.

Market Intelligence Committee

Holger Sicking (Austria)
Steven Valcke (Belgium/Flanders)
Kirstine Tostrup-Nielsen (Denmark)
Piret Kallas (Estonia)
Kristiina Hietasaari (Finland)
Joachim Scholz (Germany)
Nessa Skehan (Ireland)
Tania Sultana (Malta)
Helena Varona (Portugal)
Nataša Hocevar (Slovenia)
Roque Gonzalez (Spain)
Lena Gunnerhed (Sweden)

Partners

ETOA: Tom Jenkins / Paul Rickard
UNWTO: John Kester / Michel Julian

MIG Annual Meeting 2015

The 29th Annual Meeting of the ETC Market Intelligence Group took place in February in Dublin, Ireland. The meeting included Research Directors of ETC member countries, as well as representatives of ETC’s research partners - the European Commission (EC), the European Tourism Association (ETOA), the World Tourism Organization (UNWTO), the World Travel and Tourism Council (WTTC), European Cities Marketing (ECM) and the Organization for Economic Co-operation and Development (OECD). The meeting gave ETC members a chance to take stock of the latest trends in research and tourism and provided a platform for the exchange of expertise and research findings.

Chairmanship of the MIG

At the 29th Annual Meeting attendees elected Mr Peter Nash (Tourism Ireland) as Chairman of the Market Intelligence Group (MIG), supported by Emoke Halassy (Hungarian Tourism Ltd) as Vice-Chairperson. Currently leading the Strategy Development and Insights team at Tourism Ireland, Peter Nash has been a member of the Market Intelligence Committee of ETC for three years and has been an active and committed member of the Market Intelligence Group for several years.

Events and Webinar Calendar 2015

- **MIC Meetings**: April, June, September and December 2015
- **MIG Meeting**: February 2015
- **11th TourMIS Users’ Workshop**: September 2015
- **Digital Appeal of ‘Destination Europe’**: October 2015
Lifestyle Trends and Tourism

ETC has a long history of gathering intelligence on Europe’s key overseas travel markets. However, travellers’ choices are changing rapidly. Acknowledging the need to capitalise on long-term behavioural and attitudinal consumer lifestyle trends, ETC commissioned Future Foundation to gather new and meaningful insights on opportunities in long-haul markets suitable for action in the European tourism sector. Consumer insights are provided on five identified key trends: The End of Adventure?, Constructive Tourism, Social Living, Personality Without People and No Escape.

Handbook on Marketing Transnational Tourism Themes and Routes

Over the past decades, the appeal of developing tourism themes and routes has spread all over the world.

In order to enhance the knowledge of existing themes and routes, ETC joined forces with UNWTO to commission a Handbook on Marketing Transnational Tourism Themes and Routes. Both organisations envisage providing tourism destinations with rich opportunities to explore the options of collaboration at a pan-European level. It will also give them practical guidance to market and promote destinations through thematic tourism experiences and products.

Long-Haul Travel Barometer

The Long-Haul Travel Barometer captures people’s intention to travel abroad, their motivations and barriers to travel, as well as key characteristics of their trip. Results are based on 1,000 interviews conducted in each market every four months.

The barometer is a joint initiative of the European Travel Commission (ETC), the European Tourism Association (ETOA) and Eurail Group G.I.E. Full results are available to the members of partner organisations only, but key results will be regularly made available through the websites of partnering organisations. See the latest results on www.etc-corporate.org

Motion Infographic Video ‘Exploring the US Travel Market’

Enhancing the visibility of the wealth of information, statistics and material collected by ETC is at the forefront of the organisation’s objectives. With the aim of providing members and the public with easy and immediate access to different reports and studies, ETC is delving into new and engaging tools of content dissemination.

The production of the video Exploring the US Travel Market is the result of the first attempt of the organisation towards this aim.

The video provides facts and figures of the US travel market and outlines the profile of the average US traveller to Europe. To watch the video please visit www.etc-corporate.org
Quarterly Reports – Continued Evaluation of European Tourism Success

The publication *European Tourism - Trends & Prospects* is one of ETC’s powerful tools to monitor the performance of European Tourism and its macroeconomic environment. 2015 marked the sixth consecutive year of above-average growth for the most visited region in the world. Growth in Europe was driven by improving economic conditions, favourable exchange rates against key currencies, low oil prices and continued marketing and promotion efforts to extend the peak seasons.

On the other side of the Atlantic, a weaker euro will continue encouraging an upturn in travel demand from the US supported by a stronger US dollar and an increase in power spending and in business and consumer confidence.

Targeted Decision Making through Collaborative Benchmarking

The annual NTO Budgets Survey is ETC’s most successful example of how committed organisations are prepared to share sensitive budgetary information in order to achieve the common goal of building knowledge to enable strategic decision making.

In 2015, 30 out of ETC’s 33 members contributed to the study, providing a detailed overview of how National Tourism Organisations are structured and how their activities are funded. The most recent issue examines the involvement of members in transnational and thematic tourism activities.

ETC Snapshots

*ETC Snapshots* is a series of reports on select travel segments and markets prepared by the ETC Executive Unit. These lean reports provide a quick overview of travellers’ characteristics, the likes and dislikes of their holiday experience and their satisfaction with Europe compared to competing regions. Key recommendations are also provided with the aim of providing support and guidance to ETC member NTOs. While past reports focussed on Youth and Senior segments, the latest report features relevant insights on the Cultural Traveller.

Study on the Decision-Making Process of MCCI Organisers

The meetings industry continues to thrive within the tourism sector, generating high revenues for both cities and countries. The newly-launched *Study on the Decision-Making Process of Meetings, Conferences, Congresses and Incentives (MCCI) Organisers* is a key tool for tourism destinations to achieve a thorough understanding of this growing segment and of the factors concerning their choice of a destination or venue.

The study also gathers a compilation of successful MCCI destinations in the form of case studies and provides the best responses to address current challenges and make the most of the opportunities provided by the sector.


The International seminar on the *Study on the Decision-Making Process of Meetings, Conferences, Congresses and Incentives (MCCI) Organisers* was the best occasion to officially launch the report of the same name.

The seminar provided all participants with valuable intangible assets in the form of knowledge sharing and addressed three key issues: (i) global and regional trends in the MCCI sector, (ii) the decision-making process of MCCI organisers and (iii) key elements for a successful MCCI destination.
Exploring Health Tourism

Travel for health purposes has grown exponentially in recent years, however, the health tourism phenomenon is not a well-defined one. The prevalent need has become to better understand this global phenomenon in order to leverage opportunities and face the challenges ahead.

The ETC-UNWTO working paper *Exploring Health Tourism* is the first attempt of both organisations to identify a consistent terminology to define and describe the intricate system of travelling for health. This proposed taxonomic scheme is put into context by a vast coverage of theoretical and practical insights that will contribute to a greater understanding of the health tourism environment.

Other Studies 2015

- ETC-UNWTO Handbook on Performance Indicators for NTO Marketing Evaluation
- ETC-UNWTO Study on the Brazilian Outbound Travel Market
- ETC-UNWTO Study on the Latin American Outbound Travel Market
- ETC-UNWTO Study on the US Outbound Travel Market
- ETC-UNWTO Study on the Russian and CIS Outbound Travel Market
- ETC Interesting Articles
Chairman: Salvatore Costanzo, Italy – until July 2015
Acting Chair: Elvira Marcos Salazar, Spain
Members: Austria, Belgium, Czech Republic, Denmark, Germany, Italy, Monaco, Norway, Portugal, Spain and Switzerland

Facts and Figures

3.6 million tourist arrivals in Europe in 2015

-3.7% Average annual development through to 2020

Brazil ranks 5th among all out-of-region outbound travel markets (excluding the Russian Federation)

Gastronomy, education, history and religion dominate Brazilian travellers’ perception of Europe

36% Europe’s share of total Brazilian outbound travel in 2015

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1. ETC European Tourism Portfolio Analysis (2014)
2. ETC European Tourism Trends & Prospects (#4/2015)
5. ETC-UNWTO Understanding Brazilian Outbound Tourism – What the Brazilian Blogosphere is Saying About Europe (2013)
Travel Trade

ETC’s Brazil Operations Group concentrated its resources on two main trade events this year.

In November, the Brazil Operations Group took part in the 27th edition of the Tourism Festival of Gramado - Festuris, the most important tourism trade fair in the southern region of Brazil, which this year welcomed more than 14,000 visitors. The Brazil OG exhibited in a 32m² stand that hosted representatives from seven European countries. As well as the exhibition stand, a reception was organised to announce and promote new initiatives from ETC and its members in Brazil, including the online campaign Inspire-se Agora.

Also in November, members of the Brazil Operations Group took to the road to take part in the roadshow Experiencia Braztoa, which was organised by the Brazilian Tour Operators’ Association (BRAZTOA). The roadshow went to Salvador, Porto Alegre and Rio de Janeiro with four member NTOs attending each seminar. The roadshow seminars were based on an around-the-world concept that provided local tour operators and travel agents with unique capacity building and networking opportunities with European destinations. It welcomed more than 250 buyers and trade professionals especially selected by BRAZTOA in each host city. At both of these events, the VisitEurope.com portal was featured prominently in all promotional materials and on the exhibition stands.

Press and PR

Winners of the Journalism Award 2015. Photo: Felipe Mairowski.

2015 was the twenty-sixth year of the popular ETC Tourism Journalism Awards, which are intended to recognise the outstanding work of Brazilian journalists, photographers and bloggers in communicating the diversity of European travel experiences throughout the year. There was a record number of 139 entries this year, with 27 making it onto the final shortlist.

The winners in the eight different award categories were chosen by a panel of tourism and journalism academics and were given their prizes during a ceremony held in São Paulo. The winning journalists took part in a trip to Germany and Austria in December, during which time they had a unique opportunity to get to improve their knowledge of the traditional European Christmas markets.

In May, Imagem Corporativa was appointed to act as ETC Brazil’s PR and communication agency. Throughout the year, from its head office in São Paulo, Imagem Corporativa and ETC’s Brazil Operations Group implemented a new media strategy aimed at trade and mainstream general media.

Regular press releases and ad-hoc media pitches were published highlighting topics from gastronomy to pilgrimage and religious routes. The releases were supplemented by organised meetings with key consumer media to push stories about Europe and promote it as the number one destination for Brazilians. This led to the publication of some 65 articles in the Brazilian press with an estimated value of EUR 100,000.

ETC Brazil’s PR agency was also in charge of the management of ETC’s localised social media in Brazil, comprising a Twitter handle @EuropaJa and a Facebook page Facebook.com/europaja, which had multiplied its number of likes tenfold by the end of the year.

Consumer Marketing

Inspire-se Agora!

This was an interactive online campaign aimed at generating awareness of VisitEurope.com and increasing interactivity in our social networks for the Brazilian market. It operated on the first emotional decision-making stage, where the traveller begins to make his list of ‘ideal dream trips’.

The Brazil Operations Group created a collaborative platform called Inspire-se Agora (Get Inspired) within the VisitEurope.com site, where only our community could share photos of landscapes, works of arts from European artists, clips from European bands and other inspirational items of the day-to-day life in Europe, mixing and redirecting content to VisitEurope.com.

This campaign was co-financed by the European Commission.
Canada ranks 3rd among all out-of-region outbound travel markets (excluding the Russian Federation)¹

4.7 million tourist arrivals in Europe in 2015²

13% Europe’s share of total Canadian outbound travel in 2015³

History and heritage dominate Canadian travellers’ perception of Europe⁵

2.3% average annual growth through to 2020⁴

¹ ETC European Tourism Portfolio Analysis (2014)
² ETC European Tourism Trends & Prospects (#4/2015)
³ ETC European Tourism Trends & Prospects (#4/2015)
⁴ ETC European Tourism Trends & Prospects (#4/2015)
⁵ ETC-UNWTO Image of Europe in the US and Canadian Social Media (unpublished)
ETC’s Canada Operations Group and Interactive Travel carried out an online advertising campaign optimised for high levels of exposure and engagement. Based on the inspiring audio visual content developed for the revamped VisitEurope.com portal during 2014, it ran for one month to coincide with the main spring holiday planning period.

The target audience for this campaign was primarily 40 to 60 year old consumers with above average household income. Components of the campaign included:

- An online advertising campaign intended to generate traffic for VisitEurope.com. The campaign ads were seen more than 5.6 million times, with an average click-through-rate of nearly 1%.
- A video promotion campaign on Facebook and YouTube featuring fifteen pan-European regions. These videos were seen more than 530,000 times in total.
- A Facebook sweepstakes sponsored by Insight Vacations and Air Canada Vacations that generated 5,400 new email subscribers.

This campaign was co-financed by the European Commission.

European Union Film Festival 2015

In November, ETC’s Canada Operations Group brought the best European cinema to Toronto through the sponsorship of the 11th European Union Film Festival. The EUFF is a unique collaboration of EU Consulates and Cultural Institutes in Toronto striving to reflect the excellence, innovation and diversity of European cinema. ETC’s involvement in the EUFF 2015 provided the opportunity to build brand awareness and boost interest in Europe by showcasing the cultural diversity of its destinations to an audience of potential visitors and advocates. Over its two-week run, fifteen short videos showcasing different pan-European regions, from the Iberian Peninsula to the Baltic States, were screened before each festival film. In addition, ETC ran a Facebook sweepstakes campaign around the EUFF to drive user engagement with the page, generate new leads and email subscribers.

ETC benefited from the successful communication campaign that ran before the film festival in both print and online media. All advertising and promotional material prominently featured the VisitEurope.com logo.

The EUFF attracted more than 8,000 people with high disposable incomes – a key target audience for ETC in Canada.

The Foodie List

ETC Canada sponsored the TV series The Foodie List, broadcast on the Canadian travel network Evasion which has 2,000,000 viewers per week. The series uncovers nine European destinations through its food and recommendations by locals.

ETC benefited from acknowledgment of VisitEurope.com in the show as well as the production of a sponsored promotional video.

Travel Trade

In April, ETC’s Canada Operations Group, in partnership with the Travel Corporation, held a seminar to raise the trade’s awareness of European destinations in Canada.

The Travel Corporation, with its brands – Trafalgar, Insight Vacations and Contiki – is a travel and leisure group operating in most European destinations, catering to all travel styles and budgets.

Consumer Marketing

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The campaign was designed to raise awareness of Europe by promoting regional itineraries that featured leading visitor attractions and culinary and cultural events. Other objectives included building a database for ETC and its trade partners, and driving traffic to the VisitEurope.com portal and associated social media channels for the Canadian market.

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Chair: František Reismüller, Czech Republic

Members: Austria, Belgium, Czech Republic, Cyprus, Denmark, Finland, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Malta, Monaco, Montenegro, Norway, Poland, Portugal, Romania, Serbia, Spain and Switzerland

Facts and Figures

China ranks 2nd among all out-of-region outbound travel markets (excluding the Russian Federation)¹

12.5 million tourist arrivals in Europe in 2015²

Culture, history, authenticity and clean environments dominate Chinese travellers’ perception of Europe⁵

16% Europe’s share of total Chinese outbound travel in 2015³

8.8% average annual growth through to 2020⁴

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¹ ETC European Tourism Portfolio Analysis (2014)
² ETC European Tourism Trends & Prospects (#4/2015)
³ ETC European Tourism Trends & Prospects (#4/2015)
⁴ ETC European Tourism Trends & Prospects (#4/2015)
⁵ ETC-UNWTO Understanding Chinese Outbound Tourism – What the Chinese Blogosphere is Saying about Europe (2013)
New Chairman

CzechTourism Director in Shanghai, František Reismüller, was appointed as new Chairman of ETC’s Operations Group in China. Mr Reismüller has broad experience of working with Chinese travel agencies as well as in translation, interpretation and journalism. He graduated in sinology at the Charles University in Prague where he is still pursuing his research in the field of Chinese avant-garde literature.

As the China OG’s new Chair, Mr Reismüller takes on a significant responsibility due to the increasing relevance of the Chinese travel market for Europe.

Press and PR

In September, SinoMedia was appointed to act as the China OG’s press and communication agency. As such, SinoMedia is responsible for running and managing the networking activities and relationships of the China Operations Group with local media.

Consumer Marketing

A Focus on Social Media

In 2015, the role of social media continued to be central to ETC’s marketing strategy in China. As a brand that established its presence in Chinese social media just over a year ago, the aim was to increase awareness of Europe as a diverse, sophisticated and welcoming travel destination, targeting first-time as well as free independent, affluent and well-educated Chinese travellers.

Highly inspiring visual pan-European content on transnational routes, regions and thematic experiences as well as useful travel information was regularly shared on ETC’s social media handles in China - Sina Weibo, WeChat and YouKu - as a means of educating the market about the diversity of European destinations.

Mobile Image Campaigns

Mini-campaigns on both Weibo and WeChat channels were periodically launched to create buzz and engage with consumers. This further expanded our community and drove quality traffic to the VisitEurope.com portal in China and other countries’ websites alike.

Between November and December, ETC’s China OG carried out a mobile image campaign aimed at influencing the winter holiday season in China, especially during the Chinese New Year period. Under the title “The Travel Across Europe”, the campaign presented the wealth and diversity of European countries’ culture, cuisine and landscapes through an engaging personality test.

Participants were asked to scan their fingerprints to start the personality test in an effort to remind potential Chinese visitors of the newly-introduced policy requiring electronic fingerprints for all Schengen visa’s applicants. This campaign was co-financed by the European Commission.

Overall throughout the year, ETC’s community on Weibo grew by 24% to reach 350,000 followers, whereas the WeChat community saw a cumulative growth rate of 355%. There was a majority (55%) male audience based in the metropolitan areas of Beijing, Guangdong, Zhejiang and Shanghai.
Chairman: Eugenio Magnani, Italy  
Vice-Chair: Bruno Bedholm, Denmark  
Vice-Chair: Line Vreven, Belgium  
Members: Austria, Belgium, Croatia, Cyprus, Czech Republic, Denmark, Finland, Germany, Greece, Hungary, Ireland, Italy, Monaco, Norway, Poland, Portugal, Romania, Slovakia, Spain, Sweden, Switzerland and Turkey

Facts and Figures

25.7 million tourist arrivals in Europe in 2015²

28% Europe’s share of total U.S. outbound travel in 2015³

History, culture and the ‘Old World’ dominate US travellers’ perception of Europe⁵

6.5% average annual growth through to 2020⁴

The United States ranks 1st among all out-of-region outbound travel markets (excluding the Russian Federation)¹

¹ ETC European Tourism Portfolio Analysis (2014)  
² ETC European Tourism Trends & Prospects (#4/2015)  
³ ETC European Tourism Trends & Prospects (#4/2015)  
⁴ ETC European Tourism Trends & Prospects (#4/2015)  
⁵ ETC The Meaning of Travel and the Perception of Europe as a Travel Destination (2015)
ETC’s USA Operations Group concentrated its resources on one consumer marketing and public relations trade event in 2015.

For the second consecutive year, ETC’s USA OG teamed up with Travel + Leisure, one the most influential travel brands in North America, to carry out a cross-platform digital campaign spotlighting a variety of interactive cultural touch points, from music festivals and nightlife to arts and cultural events in European destinations.

The costumed marketing programme comprised the use of rich online media units as well as a series of print inserts targeting arts and culture enthusiasts in New York, Los Angeles, San Francisco, Chicago and Texas metropolitan areas. Discover a treasure trove of art and style, where culture is at its very heart and soul was the key message of three-month long campaign in the crucial spring planning period. It featured the following components:

- A series of single sheet inserts about arts and festivals in the June and July edition of Travel + Leisure magazine respectively. Readership was 260,000 for each edition.
- Premium targeted display media and a custom, highly visual interactive unit in the Travel + Leisure website featuring all ETC destinations with over 3.3 million impressions.
- Sponsored social media posts with over 2.2 million impressions.
- Newsletter and dedicated emails with over 380,000 delivered email impressions.

This campaign was seen 5.8 million times in total and generated substantial traffic for VisitEurope.com as well as to individual country’s websites.

In June, the USA Operations Group hosted a roundtable between European destinations and top-level traveller advisors with a unique perspective on what is happening in the travel industry. The event took place in New York City. Under the title Europe Rediscovered, the USA OG presented to the audience of 23 travel experts and A-list agents new happenings and developments, along with new service launches and marketing initiatives in their destinations.

ETC’s President and Visit Flanders’ CEO, Peter de Wilde, and Eugenio Magnani, Chair of ETC’s USA Operations Group and Director North America of the Italian Government Tourist Board, shared the floor with Travel + Leisure Editor, Nathan Lump, and Publisher, Jay Meyer, and addressed the audience during an interactive discussion to get advisors’ feedback on concrete challenges and opportunities for enhancing travel from USA to Europe. The session was followed by one-on-one speed dating meetings between countries and travel advisors on the most effective strategies in terms of marketing their destinations to them and their clients.

This campaign was co-financed by the European Commission.

![Europe Rediscovered event in New York.](image)
The Marketing Group in 2015

Chair: Elke Dens, Belgium-Flanders
Vice-Chair: Marketa Chaloupkova, Czech Republic
Vice-Chair: Angela Varela, Greece

Membership

The members of the Marketing Group (MKG) comprise the Marketing Directors of the full members of ETC. MKG is a forum for ETC members and partners to share information and best practices in the field of marketing to facilitate benchmark analysis. It also acts as a think tank that provides the organisation with strategic advice on marketing-related aspects.

Annual Meeting

The very first meeting of the new ETC Marketing Group took place in Brussels in September. The event gathered Marketing Directors of 17 National Tourism Organisation members of ETC as well as representatives from the European Commission.

The event offered ETC members a unique opportunity to shape the marketing strategy and development of their organisations. In addition to sharing insights and best practices in destination marketing, participants learnt about practical solutions through presentations of successful case study examples by top-level experts in branding and benchmarking.

This first meeting of the ETC Marketing Group also served to discuss leadership, set goals and priorities that will lay the foundation of Europe’s marketing and promotional activities over the coming year.

Digital Tourism Innovation Campus 2015

The new Marketing Group partnered up with the Digital Tourism Think Tank to deliver a truly inspiring digital leadership event for ETC members at the Digital Tourism Innovation Campus 2015 in Barcelona in November.

Focussing on the latest innovations and developments in digital, the two-day event showcased destinations that are actively transforming their organisations and took a look at how to succeed in becoming a truly digital destination – one that is ready to engage the future visitor.

Twenty-three ETC members took advantage of an exclusive Golden Ticket that provided free admission for one member of their staff as well as a significant discount applicable for any additional team members that wished to attend this unique event. A total of 42 ETC delegates participated in DTIC 2015.
Towards a long-term strategy for Destination Europe

Following the successful cooperation started in 2012, the European Commission awarded ETC a new grant agreement covering a programme of activities developed in 2015. The contract continued the Destination Europe 2020 initiative, designed to promote Europe as a tourist destination and strengthen its competitive image in overseas markets.

The first stage of the joint programme of activities (2012-2014) defined a long-term strategy for Destination Europe and was based on research and consultations with the tourism industry. It was followed by the development of appropriate communication channels, tools and processes to reach out to target segments throughout 2014.

With the third grant, covering the calendar year 2015, ETC continued focussing its efforts on the consolidation of a distinctive image, which differentiates Destination Europe from other international regions through the following actions: the promotion of inspirational pan-European experiences and the positioning and promotion of the updated and renewed VisitEurope.com portal as a primary source of information about Destination Europe for potential travellers from long-haul markets.

Additionally, ETC further developed ongoing digital marketing activities and social media promotion campaigns in order to increase the visibility of Europe as a tourist destination.

Consumer Marketing

VisitEurope.com

In the first year since its successful revamp, the VisitEurope.com portal became the focal point of all ETC’s worldwide consumer marketing campaigns, which were designed specifically to direct traffic to it.

The positive impact of this approach is clear. The new inspirational portal has proved very popular as it almost tripled its users, who now see twice the number of pages that they did before. These figures are backed up by qualitative research in target markets that confirmed the appeal of the portal and its capability to convey a multi-faceted image of Europe that provides consumers with diverse travel experiences.

This performance reflects not only the growing awareness of the portal among consumers, but also the increasing use to which it is being put by ETC’s Overseas Operations Groups. An important benefit of the redeveloped VisitEurope.com portal is the enhancement of the organisation’s reputation as a marketing organisation. A number of companies and European federations and associations have expressed an interest in being present on the site, opening up exciting new opportunities for ETC and its members to cooperate with private industry.

Together with its member National Tourism Organisations and other institutional and industry partners, ETC’s content strategy for VisitEurope.com focusses on presenting all relevant pan-European content in such a way that potential visitors respond to the promotional message on both an emotional and a rational level. Forty new pieces of original content in English were produced in 2015 to feed the main version of the portal. A selection of content based on market interests was adapted and translated into the different language versions of the site (French, Spanish, Portuguese, Chinese, Russian and Japanese), adding up to a total of 187 pieces of content.
Consumer Marketing

VisitEurope Magazine

More travel ideas for consumers were published in the monthly online VisitEurope newsletter to a mailing list of about 160,000 consumers who registered regularly on VisitEurope.com

Twenty-seven of ETC’s member countries were featured in the e-zine over the year, with an average of 22 countries appearing in each edition.

Social Media

ETC has now established global handles in the most relevant social media platforms worldwide:

- Facebook/VisitEurope
- Twitter/@VisitEurope
- Pinterest/VisitEurope
- Youtube/VisitEurope
- Google+/VisitEurope
- Instagram/@Visit_Europe

The VisitEurope.com global page on Facebook (serving mainly North America) reached 120,000 likes by the end of the year. This means an increase of 82% compared to the previous year. It generated a good level of engagement among its community and of traffic driven to VisitEurope.com

These platforms are valuable consumer marketing and communication tools. Throughout 2015, ETC implemented a comprehensive social media strategy to get inspirational pan-European content seen online and raise the effectiveness of its presence on social media.

Visit Europe Blogger Experience

A group of eight popular professional travel bloggers and photographers from USA, Brazil, China, India, Japan, Russia and the UK explored the European Cultural Route of the Huguenot and Waldensian Trail in July as part of the first Visit Europe Blogger Experience.

Guided by local experts, the group hiked for five days along this cultural route to discover UNESCO World Heritage sites, ancient fortresses and fairy-tale villages while enjoying the nature and the traditional local gastronomy, beers and wines. The chronicles of their trip along the cultural route could be followed on VisitEurope.com and in social media with the hashtag #VisitEurope as well as the platform blog.culture-routes.net and on the individual blogs and social networks of all the bloggers.

The Visit Europe Blogger Experience was aimed at promoting travel to off-the-beaten track destinations in Europe by sharing inspirational content on pan-European products and experiences. Twenty-five blog articles - an average of three posts per blogger - were published and one video was produced. The social media coverage of the blog trip generated 28,760,370 Opportunities-To-See with an estimated online advertisement value equivalent of over EUR 450,000.

The Visit Europe Blogger Experience was part of the joint activities between the European Commission and ETC to promote thematic and sustainable transnational tourism products to overseas markets. The activity was possible thanks to the cooperation with the initiative Crossing Routes - Blogging Europe of the European Institute of Cultural Routes of the Council of Europe in close cooperation with the local partners of the Cultural Route of the Huguenot and Waldensian trail.
Workshop Towards Joint Promotion of Europe

ETC and the European Commission hosted an essential workshop at ITB Berlin to discuss a course of action for the joint public-private promotion of Europe as a tourist destination. A panel with representatives from successful public-private partnerships promoting internationally important tourist destinations shared their experiences and presented their achievements to top ranking tourism officials from across Europe.

This workshop followed up on the high-level discussions initiated during the European Tourism Forum in Naples and the European Tourism Day in Brussels later in the year. These discussions highlighted the need for European tourism organisations at all levels to continue to strengthen their collaboration under the umbrella of a common approach and positioning to respond to the shifting patterns in global tourism that threaten Europe’s position as the first tourist destination in the world.

Travelling in Europe SMARTguide

On the occasion of the ITB Workshop, ETC published the Travelling in Europe: SMARTguide, a new tool aimed at supporting the work of travel professionals, operators and agents from around the globe with a solid overview of the ongoing evolution of Europe’s transport infrastructure.

ETC worked with the European Commission and the World Tourism Organization (UNWTO) as well as with the main public and private stakeholders in the European travel industry, such as the European Tourism Organisation (ETOA), HOTREC, Eurail, IATA, IRU, CLIA, Eurovelo, the World Youth Travel Confederation (WYSE), the European Spas Association (ESPA), the European Network of Accessible Tourism (ENAT) and the European Institute of Cultural Routes, to develop the contents of this publication.

The Europe SMARTguide can be read online at www.etc-corporate.org

Destination Europe Summit 2015

Shortly before WTM, ETC, in partnership with the Association for European Inbound Tourism (ETOA) and with the support of the European Commission, hosted a conference entitled Destination Europe Summit 2015.

The event focussed on how Europe is performing as a destination and discussed issues such as how private sector operators working in third countries think Europe is performing; how important it is for countries to sell themselves as part of a ‘Destination Europe package’ and what can be done about current burdens such as the taxes and regulatory problems that make Europe difficult to sell.

Chaired by Professor Tony Travers of the London School of Economics, the Summit featured a presentation by the European Commission on its tourism policy priorities, a talk by Gideon Rachman of the Financial Times on how Europe is perceived by the rest of the world and a series of panel discussions on three source markets - the USA, China and Russia including leading operators from those markets.

Original research featuring which destinations in Europe are doing well and which origin markets are showing the most promise and why, was also released on the day.

A recording of the event is available on www.etc-corporate.com/events
Research

ETC Executive Dashboard
The Executive Dashboard is the new single entry point to ETC’s vast market intelligence. This highly visual and user-friendly portal has been conceived as a data hub that collects indicators critical to monitoring tourism performance in Europe and in key source markets. Smart technology links statistics to ‘soft’ information from news and studies, to help users gain deeper insights on outbound travel markets and the latest travel trends. The Dashboard is a continuous project, constantly improving and growing to offer the best value and user experience.

This service is part of Destination Europe 2020 initiative. The Executive Dashboard www.etc-dashboard.org is a service exclusively for ETC members. To receive access credentials please contact the Executive Unit.

Search Engine Optimisation
Today’s travellers have access to a wide range of sources of information to gather material on a tourism destination or to organise a trip. This generation of travellers has developed strong critical thinking and consumer skills which makes them more informed and demanding.

New VisitEurope.com Content: The Meaning of Travel from Brazil and Russian Federation
This study, based on the evaluation of content of the revamped VisitEurope.com website, provides new and meaningful insights on consumers and their response to ETC’s new communication approach. Findings summarised in the report shed light on the meaning of travel among target groups from two important markets - Brazil and the Russian Federation. The study also investigates the perception of Europe as a travel destination and provides recommendations on which type of online media content proves most effective in inspiring consumers.

Results feed into ETC’s promotion of the VisitEurope.com portal and its long-term strategy Destination Europe 2020. The aim is that this report also provides meaningful information to ETC members and contributes to best practice in co-ordinating marketing activities in long-haul markets.

Destination Europe’s Digital Appeal
The majority of leisure travellers begin searching online before they decide how or where to travel. Derived from the footprints they leave behind online, the report measures - and benchmarks against global competition - the touristic brand appeal of European destinations in the digital sphere.

The report gives a comprehensive overview of search volumes for all the individual destinations of Destination Europe and classifies online behaviour into specific activity segments, or brand tags that can be benchmarked.

www.etc-dashboard.org is a service exclusively for ETC members. To receive access credentials please contact the Executive Unit.

Given the importance of the internet as a means of collecting information on tourism destinations, ETC has developed a strategic online approach in order to maximise the online visibility of the revamped VisitEurope.com portal on search engines. Through the integration of SEO best practice, this project was a successful mechanism to achieve a strong position of the brand Destination Europe.
ETC Opens to the Private Industry

Building on its vision, in 2015 ETC opened its membership to private organisations and academia with the aim of seeking cooperation, support and help in strengthening the sustainable development of Europe as a tourist destination. This new approach replies on broader cooperation with the travel industry, building alliances to support the tourism sector in Europe.

The ETC Associate Membership Programme focusses on public relations and advocacy, while granting access to cooperation in marketing and research activities on an ad-hoc basis. The ETC General Meeting #90, held in Belgrade on 8th October, approved applications from the first four associate members of ETC.

A warm welcome to Expedia, Amadeus, Global Blue and Emirates as they join the oldest European tourism association!

Expedia, Inc. is one of the world’s leading travel companies, with an extensive brand portfolio that includes some of the world’s most trusted online travel brands. Expedia empowers business and leisure travellers through technology with the tools and information they need to efficiently research, plan, book and experience travel. In addition, through its advertising and media businesses Expedia helps businesses and, among others, tourism authorities reach a large audience of travellers around the globe. Expedia, Inc.’s companies operate more than 100 branded points of sale in more than 60 countries.

Established in October 1985, Emirates has become one of the fastest growing and innovative international network carriers in the world. Emirates now operate a fleet of over 230 Airbus and Boeing aircraft currently serving 148 destinations in 80 countries.

Global Blue is the world’s leader in providing tax refunds to international travellers and global shoppers. Having invented the concept of Tax Free Shopping 35 years ago, Global Blue allows travellers to save up to 19% on the world’s best loved brands when shopping abroad. The Global Blue Group has operations in 43 countries around the world, catering to over 35 million transactions annually in a network of 270,000 international merchants, including major luxury brands, department stores, high-street retailers, hotels, supermarkets and smaller independent brands. As a natural part of their business, Global Blue also has strong and established long-term relationships with tourism, customs and tax authorities around the world.

Amadeus is a leading provider of advanced technology solutions for the global tourism and travel industry. In the last ten years, Amadeus has invested €3.5bn in R&D in technology for travel and tourism. Amadeus connects travel providers (airlines, railways, rental cars, hotels, tour operators, ferries) with more than 90,000 travel agencies worldwide, processing more than 500 million bookings per year. Amadeus has its headquarters in Spain, France and Germany. Amadeus is actively engaged with the European Parliament, the European Commission and tourism industry stakeholders to reinforce the sustainability of the tourism sector.

The airline is the world’s number one international carrier by Revenue Passenger Kilometres (RPKs). In 2014-15, Emirates carried 49.3 million passengers, up 11% on the previous year, with an average seat load factor of 79.6%. The airline employs over 56,000 employees worldwide. Emirates’ operations, including the impact of the 220 unique connections it offers, supported 85,100 jobs across the EU in 2013-14, equivalent to €6.8 billion GDP of the total EU GDP.
Since its formation, the European Travel Commission has been advocating the importance of tourism as an engine for the European economy and, in the last decades, has positioned itself at the forefront of the European tourism scene. The organisation’s Statutes state that “through its activities, ETC shall contribute to raising awareness and understanding among national European authorities and the general public of the importance of tourism and the need to ensure its development through appropriate collective measures”.

Following the election of the three new Vice-Presidents in April 2015, the organisation relied on its resources to develop an advocacy programme aimed at pointing the attention of the policy makers on the issues affecting European visitors’ economy with the long term goal of creating advantages and remove disadvantages for the tourism sector in Europe.

**ETC Supports Open Skies by ETC Together with European Airports**

In June 2015, ETC announced the release of a joint position on Open Skies together with the European Chapter of Airports Council International. The statement underlined the need to support connectivity by expanding Open Skies beyond Europe.

European tourist destinations are increasingly tapping into the growing middle-classes of emerging markets with the expectation of attracting a growing number of visitors in the future. In this context, air connectivity has acquired a new strategic relevance for the European economy.

EU connectivity gains have been the highest to the Middle East, reflecting the increased importance of the Gulf States as trading partners for the EU and the role played by the Gulf airlines in connecting the EU to Asia via their hubs.

In the long-term ETC vision, connectivity goes beyond Open Skies. The EU’s new Aviation Strategy should address a range of issues, such as more liberal and tourist-friendly visa policies, enhancing airport capacity, abolishing aviation taxes, reducing regulatory driven costs and implementing the Single European Sky. In the future, the major growth in tourism arrivals will come from the emerging source markets located outside Europe, and a good aviation strategy will be an important prerequisite to keep Europe world’s number one tourist destination.

**ETC Calls for a Visa Reform That Would Bring €114 Billion and 615,000 New Jobs**

In view of the debate in the European Parliament regarding the recast of the Schengen visa code throughout 2015, the European Travel Commission called for reform of the way visas are granted to leisure and business travellers in order to gain a benefit of €114 billion in export revenue and 615,000 new jobs in Europe by 2020.

Last spring, ETC commissioned Tourism Economics to undertake an analysis of the impact for Continental Europe of different degrees of liberalisation (benchmarked against no reform) for 10 priority source markets, which together account for more than half (53%) of the visa-constrained visits to European destinations.

These included China, Russia, India, Turkey, Indonesia, Belarus, Tunisia, Saudi Arabia, South Africa and Thailand. They were selected for their size and growth potential as well as their population’s propensity to travel. David Goodger, Tourism Economics’ Director, explained that adopting the ‘best practice’ policies for the ten profiled markets would generate 3.4 million additional arrivals to European destinations each year by 2020.

The largest benefits would flow from a complete visa waiver for these markets, in which case 21.8 million additional arrivals per year would be expected. Over the period...
to 2020, this would generate €114 billion in new export revenue and 615,000 additional jobs, including direct, indirect and induced employment.

At a press conference at the World Travel Market in London, Mark Henry, Vice-President and Coordinator of ETC’s visa advocacy work, presented a range of practical initiatives to deliver improved openness in ways that avoid compromising security or immigration control. A week later, ETC’s recommendations for action were also presented to Members of the European Parliament at a roundtable discussion.

Based on the results of the analyses performed by Tourism Economics, ETC advocates for the adoption of best practice improvements for the current available visa types to ease the administrative burden for tourists.

**Tourism for Growth and Jobs Manifesto**

For the first time ever, 30 European public and private tourism stakeholders including the European Travel Commission (ETC) have united and, with a common voice, presented their Tourism for Growth and Jobs Manifesto on the occasion of the European Tourism Day held on 16th December 2015.

Following extensive consultations, stakeholders representing travel agents and tour operators, air, rail and ground transportation, accommodation, local travel operators, restaurants, bars, cafés, shopping centres, attractions, tourist sites, and many others, identified the challenges faced by the sector nowadays and formulated concrete actions to tackle in the coming years. The actions are listed in the Manifesto document under eight priority areas: competitiveness, digitalisation, good governance, joint promotion, reduce seasonality, skills and qualification, sustainability and transport connectivity.

The document was presented to the representatives of the European institutions and has the support of Members of the European Parliament - Ana-Claudia Tapardel (S&D), Cláudia Monteiro De Aguiar (EPP), Isabella De Monte (S&D) and István Ujhelyi (S&D), and the European Commission, represented by Jakub Cebula, Member of the Cabinet of EU Commissioner for Internal Market, Industry, Entrepreneurship and SMEs, Elzbieta Bienkowska; and Carlo Corazza, Head of the Tourism, Emerging and Creative Industries Unit, DG Growth.

The full Manifesto is available for download at [www.tourismmanifesto.eu](http://www.tourismmanifesto.eu)
In 2015, ETC continued expanding its network of strategic partners in the European travel and tourism sector, with a view to strengthening the competitiveness of the tourism industry in Europe as one of the main engines of economic growth and employment.

On the occasion of the General Assembly of Eurail, held in Ghent on 17th June 2015, ETC and the Eurail Group signed a Memorandum of Understanding. The areas of cooperation include knowledge and information sharing and collaboration in selected research projects.

Eurail Group was established in 2001 as an organisation dedicated to the marketing and management of the Eurail Pass. The organisation is owned by, represents and acts for the 30 European railway organisations that make up its membership.

A week later, on 25th June 2015, ETC’s Eduardo Santander and Olivier Jankovec, Director General of ACI Europe, committed to pursue policy alignment between the two organisations and related joint initiatives to the benefit of both parties. A particular focus will be to increase the connectivity of European airports and attract more passengers, with the aim of facilitating international tourism arrivals in Europe.

ACI EUROPE and ETC join forces on any matter impacting tourism and air transport, such as passenger facilitation, airport connectivity, airport capacity, intermodality and access to airports and promoting European destinations. ACI Europe represents over 450 airports in 45 European countries and its member airports handle over 90% of commercial air traffic in Europe, welcoming more than 1.7 billion passengers, 16.8 million tonnes of freight and 20.8 million aircraft movements.

In order to enhance tourism cooperation across the Atlantic, ETC and the European Tourism Association (ETOA) met with Brand USA and the US Travel Association to exchange strategies and visions with the aim of increasing tourism flows in both directions. Since the beginning of this year, the US market has reacted positively to the ongoing economic recovery and strong currency, and outbound trips from the US to Europe increased by 11.4% in 2015.

Finally, in December 2015 ETC and the European Commission signed a new cooperation agreement covering a programme of activities to be developed in 2016. The new contract continues the Destination Europe 2020 initiative, designed to promote Europe as a tourist destination and strengthen its competitive image in overseas markets.
The European Travel Commission is constituted under Belgian law as an International Association Without Lucrative Purpose (AISBL/IVZW).

Being a non-for-profit organisation, ETC is subject to tax on legal entities, which is not applied on global income but only on income derived from specific sources, i.e. real estate. The main source of income is from membership contributions, the level of which is approved each year at the ETC General Meeting.

In 2015, ETC was awarded an operational grant by the European Commission, dedicated to the performance of activities enhancing the promotion and visibility of Europe and its destinations on third markets (Destination Europe 2020).

### Total 2015 Budget

<table>
<thead>
<tr>
<th>Head Office</th>
<th>Operations Groups</th>
<th>MKG</th>
</tr>
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<tbody>
<tr>
<td>653,310</td>
<td>473,000</td>
<td>20,000</td>
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</table>

**TOTAL Budget: 1,878,710**

### 2015 Head Office Budget

(Divided by Type of Funding)

- **Grants from European Commission:** 215,000
- **Membership contributions:** 438,310

**Total:** 653,310

### 2015 Market Research Budget

(Divided by Type of Funding)

- **Grants from European Commission:** 125,000
- **Membership contributions:** 180,000

**Total:** 305,000

### 2015 Marketing Activities Budget

(Divided by Type of Funding)

- **Grants from European Commission:** 32%
- **MKG:** 20,000
- **Membership contributions:** 68%
- **Operations Groups:** 473,000
- **Other marketing activities:** 427,400

**Total:** 920,400

**NOTE:** All figures are in Euros.
WHO IS WHO AT ETC

President

Peter De Wilde
(Belgium-Flanders)

Vice-Presidents

Mark Henry
(Ireland)

Ólöf Ýrr Atladóttir
(Iceland)

João Cotrim De Figueiredo
(Portugal)

Board of Directors

Petra Stolba
(Austria)

Michel Vankeerberghen
(Belgium-Wallonia)

Alexander Moutanov
(Bulgaria)

Tarmo Mutso
(Estonia)

Petra Hedorfer
(Germany)

Fabio Lazzerini
(Italy)

Zeljka Radak-Kukavicic
(Montenegro)

Per-Arne Tuftin
(Norway)

Robert Kepinski
(Poland)

Marta Blanco
(Spain)

Mauro Maiani
(San Marino)

Organisation Structure

General Meeting

Board of Directors

32 Members

President
3 Vice-Presidents
10 Members

Executive Unit
Executive Director

Marketing Group
Market Intelligence Committee

Operations Groups
USA, Canada, China, Brazil
ETC MEMBER ORGANISATIONS

Full Members

Austria
Austrian National Tourist Office [ANTO]

Belgium
Flanders: Visit Flanders
Wallonia: Wallonie-Bruxelles 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 Ltd.

Iceland
Icelandic Tourist Board

Ireland
Fáilte Ireland
Tourism Ireland Ltd.

Italy
The Italian Government Tourism Board

Latvia
Latvian Tourism Development Agency [TAVA]

Lithuania
Lithuanian State Department of Tourism

Luxembourg
Luxembourg National Tourist Office [ONT]

Malta
Malta Tourism Authority [MTA]

Monaco
Monaco Government Tourist and Convention Office

Montenegro
National Tourism Organisation of Montenegro

Norway
Innovation Norway

Poland
Polish Tourist Organisation [PTO]

Portugal
Turismo de Portugal, I.P.

Romania
Romanian National Authority for Tourism

San Marino
State Office for Tourism

Serbia
National Tourism Organisation of Serbia [NTOS]

Slovakia
Slovak Tourist Board

Slovenia
Slovenian Tourist Board

Spain
Turespaña - Instituto de Turismo

Switzerland
Switzerland Tourism

Turkey
Ministry of Culture and Tourism

Associate Members

amadeus
Emirates
expedia inc.

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