DEAR FRIENDS AND PARTNERS OF ETC,

LAST YEAR, 2018, WAS A VERY SPECIAL YEAR FOR THE EUROPEAN TRAVEL COMMISSION AS IT MARKED THE 70TH ANNIVERSARY OF ETC’S FORMATION IN 1948. AS THE PRESIDENT OF ETC, I WAS EXCEPTIONALLY HAPPY TO GREET ALL ETC MEMBERS AND PARTNERS IN MY HOME REGION OF FLANDERS TO CELEBRATE THIS SPECIAL DATE TOGETHER.

IT WAS ALSO THE PERFECT MOMENT TO LOOK BACK ON SEVEN DECADES OF ETC HISTORY AND ASSESS TOURISM CONTRIBUTION AS AN ENGINE FOR ECONOMIC GROWTH IN EUROPE, AND TO RE-EVALUATE THE FUTURE OF THE TRAVEL INDUSTRY.

WHEN ETC WAS FOUNDED, THE OLD CONTINENT WAS UNDER RECONSTRUCTION. THE JOINT EFFORTS OF THE NATIONAL TOURISM ORGANISATIONS WERE AIMED AT ADVOCATING THE IMPORTANCE OF TOURISM FOR PROSPERITY AND PEACE. IN THE FOLLOWING DECADES, TOURISM HAS BEEN A CATALYST FOR ECONOMIC GROWTH AND JOB CREATION IN EUROPE.

OVER THE PAST YEARS, HOWEVER, THE TOURISM INDUSTRY HAS BEEN QUESTIONING IF THE CURRENT MODEL IS SUSTAINABLE, AND IF THE GROWTH IN VOLUME IS THE RIGHT WAY TO DEFINE AND MEASURE SUCCESS. IN SEARCH OF THE ANSWERS, ETC RE-DISCOVERED ITS ROOTS AND HISTORICAL MISSION. ETC TODAY CHOOSES A VALUE-BASED APPROACH INSTEAD OF A MERE GROWTH IN VOLUME BY COMPLETELY CHANGING THE MARKETING STRATEGY.

AS FROM MID-2019, ETC WILL PROMOTE TRAVEL TO EUROPE BY TARGETING TRAVELLERS’ PassIONS INSTEAD OF THEIR PLACE OF RESIDENCE. ETC WILL BE ABLE TO PROVIDE MORE VALUE TO THE VISITORS’ TRAVEL EXPERIENCE, AND AT THE SAME TIME FOR LOCAL RESIDENTS WHO SHARE THE SAME PASSION DEEP IN THEIR HEARTS. OUR NEW PLAN WILL, THEREFORE, FOCUS ON CONNECTING PEOPLE AND SPREADING THE BENEFITS OF TOURISM TO LESS-ER-KNOWN DESTINATIONS.

WITH THIS PROGRAMME IN ACTION, PROMOTION OF EUROPE EVOLVES FROM A MULTIPLE DESTINATION BRAND APPROACH TO A MULTIPLE PASSION BRAND APPROACH. NOW, INSTEAD OF PRESENTING EUROPE AS A SUM OF DESTINATIONS, THE NEW STRATEGY WILL PROMOTE THE CONTINENT AS A SUM OF PASSIONATE EXPERIENCES IN MULTIPLE DESTINATIONS AROUND EUROPE.

IN THE PAST YEAR, ETC HAS ALREADY STARTED SHIFTING ITS MARKETING AND ADVOCACY ACTIVITIES IN THE FOLLOWING DIRECTION. CARRIED OUT WITH REMARKABLE SUCCESS, THE 2018 EU-CHINA TOURISM YEAR WAS LARGELY FOCUSED ON ATTRACTING INDEPENDENT CHINESE TRAVELLERS OFF-SEASON AND OFF THE BEATEN PATH. SET UP BY ETC IN COLLABORATION WITH THE EU, JOINT PROMOTION PLATFORM FUNDED 62 MARKETING ACTIONS, PRIMARILY AIMED AT PROMOTING LESSER-KNOWN EUROPEAN ITINERARIES.

ETC ALSO SIGNIFICANTLY CONTRIBUTED TO THE EUROPEAN YEAR OF CULTURAL HERITAGE HIGHLIGHTING THE INEXTRICABLE LINKS BETWEEN TOURISM AND CULTURE. IN PARTICULAR, ETC’S WORKSHOP, CONTRIBUTION OF TOURISM PROMOTION TO CULTURAL HERITAGE, RAISED AWARENESS OF THE VALUE OF TOURISM PROMOTION FOR SOCIO-ECONOMIC AND URBAN DEVELOPMENT, CULTURAL SUSTAINABILITY AND PRESERVATION.

WHEN ETC WAS ESTABLISHED 70 YEARS AGO ON THE BASIS OF SHARED INTERESTS, IT WAS MEANT TO BE MORE THAN A COLLABORATION TO GENERATE AN ECONOMY OF SCALE. BY ATTRACTING TRAVELLERS WHO ARE PASSIONATE ABOUT WHAT EUROPE HAS TO OFFER, AND ENFORCING ‘DESTINATION EUROPE’ ON THE LONG-TERM, WE SET UP A VERY TIMELY AND NECESSARY STRATEGY FOR THE EUROPEAN TRAVEL INDUSTRY TO MOVE TOWARDS SUSTAINABLE DEVELOPMENT.

I TRUST OUR MEMBERS AND PARTNERS WILL SUPPORT US IN THIS NEW EXCITING JOURNEY.

PETER DE WILDE, ETC PRESIDENT
The Executive Unit is based in Brussels and operates in the following fields: Marketing and Communication, Digital, Public Affairs, Research, Partnerships, 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 2018, the Executive Unit was proud to include staff members and trainees from ten different countries – Belgium, Bulgaria, Czech Republic, Germany, Greece, Ireland, Romania, Russia, Spain and Turkey.

Updated according to current structure at the date of publication in May 2019.
“Change is coming to the tourism sector...let’s BE the change”

The ultimate measure of a man is not where he stands in moments of comfort and convenience, but where he stands at times of challenge and controversy. Martin Luther King, Jr

For many decades, tourism has been an intrinsic part of Europe and European society. As a continent woven together with diverse cultures, scenery and languages, we are united by our values of openness, innovation and trade. We have invested heavily in promoting all that Europe has to offer and have reaped the rewards of these efforts. In recent years, however, Europe’s tourism landscape has changed, and we must head down a different path.

Rather than continuing with current policies, European destinations must focus on long-term tourism management solutions to enable tourism to flourish, not merely grow. We need to talk about quality instead of quantity, increased competitiveness instead of market share, collaboration instead of competition.

The founding principle of ETC is to promote tourism as a catalyst for peace, understanding and respect. This original mission is as valid today as it was when we started 70 years ago. ETC sees the changes needed in our industry as opportunities, and we believe a three-pronged approach is necessary for European tourism to thrive going forward.

Firstly, we must focus on maximising the benefits of tourism for all citizens through creative ideas based on cooperation among destinations and evidence-based market research (like our new marketing strategy, Horizon 2022). We must ensure that both travellers and citizens share the profits of the tourism industry - directly from the business itself, but also through new opportunities and possibilities of employment, including converting old jobs to new ones.

Secondly, we need to find solutions to more effectively disperse visitors throughout the year, and geographically over Europe. By decreasing seasonality and alleviating pressure from city hubs, we will bring economic benefits to communities situated beyond tourist hotspots which have not typically benefited from tourism.

Lastly, we need to encourage the tourism industry to come together, to boost public-private partnerships and to seek collaboration between sectors. This consolidation will let us bring about the change necessary for tourism destinations to operate and grow healthily.

Tourism, when managed well, provides an incredible boost to host communities; it can transform the lives of citizens and help businesses prosper where they didn’t before. When tourism is not managed well, however, it can lead to overcrowding and an erosion of the culture and environment which visitors once came to celebrate. As a vast continent with an abundance to offer to travellers, this mismanagement is the enemy of tourism in Europe, not growth.

Change is coming to the tourism sector and we must embrace it. Let’s work harder, let’s find solutions together, and let’s not only be part of the change - let’s BE the change itself.

Our President, Vice-Presidents, Board of Directors and members of our General Meeting deserve a special mention for their forward-thinking guidance and for keeping the spirit of collaboration among our members and partners.

Finally, I would like to thank my team at the Executive Unit in Brussels for their extraordinary work this year.

Eduardo Santander, Executive Director
THE EUROPEAN TRAVEL COMMISSION CELEBRATES ITS 70th ANNIVERSARY

Last year, 2018, marked seven decades since ETC’s initial formation in 1948. ETC celebrated its milestone anniversary during General Meeting #96, kindly hosted by Visit Flanders in the impressive surroundings of Antwerp Zoo. Welcomed in a remarkable setting with columns of pink marble and high ceilings in pure art nouveau style, ETC members, partners and special guests mingled over a tantalising aperitif in the Marble Hall of Antwerp Zoo.

To commemorate this special occasion, ETC invited guests on a journey through the last seven decades with a presentation of ETC’s history book. Authors of the book shared the most exciting stories from the history of European tourism and ETC’s past, outlining the major promotional campaigns, crucial institutional shifts and political challenges facing tourism in Europe.

The guests also enjoyed the opportunity to go through original ETC historical materials displayed in the room. They were especially fascinated by the first US promotional campaigns from the early 1950s, in black and white, and the series of colourful ‘Invitations to Europe’ published in the New York Times.

Following an evening walk through Antwerp Zoo, guests were surprised by the special underwater location of the celebratory gala dinner - set up at the aquarium. ETC members and partners enjoyed a culinary three-course menu, eye-to-eye with sharks and tropical fish.

After dinner, all guests received anniversary souvenirs and a personal copy of The History of the European Travel Commission (1948-2018).
To mark its 70th anniversary, ETC published a book detailing its work over the past seven decades. The book, entitled The History of the European Travel Commission (1948-2018), takes its readers on a journey through a history of collaboration in promoting Europe as a single destination overseas, and in making travel to and within Europe more accessible and appealing.

“ETC has outlined seven decades of the history of tourism in Europe and one of the world’s oldest intergovernmental tourism organisations,” said ETC President Peter De Wilde at the official presentation of the book at the ETC annual event in Antwerp. “It’s an exciting journey that reflects how our beloved Europe has faced and overcome challenges. As long as we’re able to come together as Europeans and define our common dreams, our leadership in the tourism field will open doors to a better world where people will view travelling as an experience of sharing values and respecting identities that can transform lives,” he added.

Composed of six broadly chronological chapters, the book traces the development of the European tourism sector from the foundation of the European Travel Commission in 1948 up to the present day. It describes the years of post-war reconstruction in Europe and the role of the Marshall Plan in the development of tourism in Europe.

The book highlights the first joint European marketing campaigns overseas, and how ETC’s publicity in America became the flagship activity for the organisation. The work focuses on new political challenges of mass tourism which emerged in full force in the 1960s. The 1970s and 1980s brought both significant developments that rocked the travel industry, such as new aircrafts and computer-based technologies, along with enormous challenges (economic downturns, a nuclear disaster and terrorist attacks) which required ETC’s response.

The post-Cold War years significantly expanded ETC membership to Central and Eastern Europe and increased its collaboration with the European institutions. The launch of visiteurope.com in 1996 marked the start of digital promotion for “Destination Europe”. The final chapter looks at what ETC has accomplished after its change of leadership in 2012 to the present day, expanding its activities and asserting its position as the voice of European tourism in the 21st century.

The History of the European Travel Commission (1948-2018) was researched and written by three professional historians in the tourism sector – Dr Igor Tchoukarenko (University of Minnesota), Dr Sune Bechmann Pedersen (Lund University), and Dr Frank Schipper (Foundation for the History of Technology, Eindhoven).

The full book is publicly available on ETC’s corporate website: https://etc-corporate.org/70-years/
Overall, 2018 was another encouraging year for the Europe-markets (i.e. US and China) and robust demand from Europe’s largest long-haul source tourism. Recent results mirror the resilience of the sector arrivals and more than half (51 per cent) of the share of global with a remarkable six per cent increase in international tourist for 14 per cent of the market’s outbound travel.

Travel demand from the US remains on firm footing, fuelled by a strengthened US dollar against the euro and sterling, rendering Europe an affordable tourism destination. In 2018, Europe hosted around 33 million international tourist arrivals, marking the country’s slowest rate of expansion since 1990. Yet, soaring Chinese arrivals to Europe continue to support the region’s tourism expansion. Growth drivers remain in place: China’s expanding middle class with higher purchasing power, improving air connectivity, upgraded visa procedures and Tourism Years (EU and Turkey). Chinese tourist arrivals to Europe increased by six per cent in 2018, accounting for 14 per cent of the market’s outbound travel.

Emerging trends with the potential to shape the travel and tourism sector in 2019 are apparent. Among other trends, the sector will face an already-experienced and tech-savvy traveller willing to take more control over their trip experiences supported by enabling technologies.

Under-tourism, the worry-free version of over-tourism, will become subject to a marketing trend as emerging destinations portray themselves as exciting and immersive alternatives to congested areas. Besides, low-cost carriers will face rapid growth and competition from mainline carriers.

Although Europe remains the world’s number one tourism destination, the lack of dedicated attention to the specific challenges (visa facilitation, carrying capacity, increased competition etc.) facing the tourism industry is enough to considerably weaken the region’s competitiveness. A shift towards more innovative and sustainable approaches is necessary to enhance the quality of tourism services to exceed travellers’ expectations in relation to the European travel experience.

“Low-cost carriers will face rapid growth and competition from mainline carriers”

**International Tourist Arrivals by European Subregion in 2018**

- **Southern/Mediterranean Europe**: 286 million
- **Central/Eastern Europe**: 144 million
- **Western Europe**: 204 million
- **Northern Europe**: 78 million

Source: ETC Executive Dashboard, UN World Tourism Organization (UNWTO) & World Travel & Tourism Council (WTTC)
The Market Intelligence Group (MIG) brings together the research directors of ETC’s 33 member National Tourist Organisations (NTOs). An essential event in the calendar of the MIG is the group’s Annual Meeting held early in the year, which establishes new research programmes for the upcoming year.

**3rd MIG & MKG MEETING**

The third Market Intelligence Group (MIG) and Marketing Group (MKG) Annual Meeting took place on February 1-3 in Vilnius, Lithuania. The meeting gathered Research and Marketing directors of ETC member countries, as well as representatives of ETC’s research partners – the World Tourism Organisation (UNWTO), the European Tourism Association (ETOA) and the European Commission (EC). Delegates from the International Air Transport Association (IATA), Amadeus and STR Global were also present.

The meeting offered ETC members a chance to learn about and exchange knowledge and expertise on the latest trends in research and tourism.

**THE MIG IN 2018**

**Chair:** Sérgio Guerreiro (Portugal)

**Vice-Chair:** Emil Kukalj (Montenegro)

**Co-ordinators:**

- Jennifer Iduh (ETC Executive Unit),
- Lyublena Dimova (ETC Executive Unit)

**2018 COMMITTEE**

- Holger Sicking (Austria)
- Saša Popovac (Croatia)
- Piret Kallas (Estonia)
- Joachim Scholz (Germany)
- Csilla Szabó (Hungary)
- Miklós Mader (Hungary)
- Nessa Skehan (Ireland)
- Tania Sultana (Malta)
- Emil Kukalj (Montenegro)
- Patricia Seguro (Portugal)
- Sérgio Guerreiro (Portugal)
- Álvaro Blanco (Spain)
- Barbara Zmirzlikar (Slovenia)
- Steven Valcke (Belgium-Flanders)
- Vincent Njï (Belgium-Flanders)

**PARTNERS**

- ETOA - Tim Fairhurst/Tom Jenkins
- UNWTO - Sandra Carvao / Michel Julian/ Julia Baunemann

**EVENTS & WEBINARS 2018**

- Feb: Annual Meeting
- April: (Teleconference), June, Sept & Dec: MIC meetings
- April: ETC & UNWTO Webinar - Marketing Transnational Tourism Themes and Routes
- Sept: 14th TourMIS Users’ Workshop and International Seminar on Digitalisation & Innovation in Tourism
- Sept: Webinar - Tracking Multi-Destination Travel in Europe from Long-Haul Source Markets
- Nov: ETC & UNWTO Webinar - Gulf Cooperation Council (GCC) Outbound Travel Market
- Jan, April, June & Oct: Webinar - European Tourism Trends & Prospects

**MARKET INTELLIGENCE GROUP (MIG)**

**MEMBERSHIP**

The Market Intelligence Group (MIG) brings together the research directors of ETC’s 33 member National Tourist Organisations (NTOs). A key event on the calendar of the MIG is the group’s Annual Meeting held early in the year, which establishes new research programmes for the upcoming year.

The Annual Meeting takes place over three days in different locations, providing an opportunity for delegates to learn about and exchange knowledge and expertise on the latest trends in research and tourism.

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**EUROPEAN DESTINATIONS THRIVED IN 2018**

The ETC quarterly reports, European Tourism - Trends and Prospects, provide readers with insights into the status quo of European tourism and the broader macroeconomic environment, as well as the status of short and long haul travel to Europe. The reports are the source of information needed to get the know-how necessary to monitor the short-term development of European tourism.

According to the latest results, virtually all reporting destinations (32 out of 33) registered some form of expansion. Turkey (+22 per cent) was the star performer, with its recovery driven by a wide range of source markets and a depreciating lira. Serbia also led growth benefitting from its visa-free access to Chinese passport holders, while Malta’s efforts to consolidate its position as a year-round destination materialised (both +14 per cent). Montenegro (also +14 per cent) saw solid results thanks to the continued development of tourism infrastructure, improved air connectivity and promotional activities carried out in priority markets.

Following almost eight years of staggering growth, Iceland’s tourism boom stabilised (+ five per cent) in 2018. The UK (+ four per cent) was the only market in negative territory based on data to September.

In line with ETC’s effort to foster the dissemination of research, new features have been developed to provide visually-appealing and reader-friendly research content. Besides the ‘Special Feature’, covering hot topics concerning the tourism industry, a new set of infographics, a video and an Executive Summary are some of the new materials produced by the ETC research team. These new materials summarise the key findings of the quarterly reports and are available for the wider public on the ETC corporate website.

The reports are publicly available on ETC’s corporate website: [https://etc-corporate.org/publications/](https://etc-corporate.org/publications/)
ETC looks at multi-destination travel patterns of Chinese, Indian, Japanese and US visitors in Europe

Visiting several destinations in Europe in a single trip has, in the last few years, become increasingly popular among a large share of overseas visitors. While each European destination has its own history, culture and natural features, it is the combination of countries that can provide visitors with the greatest set of experiences.

In light of this growing trend, ETC published the study, Tracking Multi-Destination Travel in Europe from Long-Haul Source Markets. The report identifies 13 clusters of destinations that are typically part of the same itinerary and describes their seasonal profiles, attractiveness and associated themes. The research delves into multi-destination travellers’ needs, preferences and behaviours, and provides strategic recommendations to European destinations on how to leverage the country-clusters identified for joint marketing and promotional actions. Insights are also meant to encourage local tourism authorities and product providers to engage in cross-border cooperation.

How to target travel trade in China and the United States?

In 2018, ETC published two snapshot reports on the Chinese and the United States (US) travel markets. These reports serve as practical ‘first aid tools’ for European tourism stakeholders looking for information and do business with tourism operators in these markets.

Along with information on the economic and regulatory environments, tourism policies, and the structure of the travel trade in China and the US, the reports describe marketing challenges and opportunities pertaining to business.

How to target travel trade in China and the United States?

Readers can also find a set of recommendations on how to adequately target the travel trade - and the travellers - in these important source markets.

The ETC snapshot reports are a small part of the numerous initiatives supported by the European Union and funded under the framework of the 2018 EU-China Tourism Year and Partnerships in European Tourism.

The reports are available online on the official publications page of the European Union website: https://publications.europa.eu.
MEASURING TRAVEL SENTIMENT IN KEY OVERSEAS MARKETS

In 2018, ETC released three infographics providing forward-looking information on the travel sentiment of people in key overseas markets. Besides measuring the intention to visit Europe in the near future, the infographics revealed respondents’ preferences in terms of destinations, activities, length of stay and daily budget. These infographics are an excellent tool to summarise and present the findings of the Long-Haul Travel Sentiment Survey & Index (LHTSI) in an attractive and reader-friendly way.

The LHTSI monitors the travel sentiment among potential travellers from Brazil, China, Japan, Russia and the US. Results are based on 1,000 interviews conducted in each market every four months. The Long-Haul Travel Sentiment Survey & Index project is launched with the support of the European Travel Association (ETOA), Eurail Group G.I.E. and TCI research.

CHINESE GLOBAL AIR RESERVATIONS DATA ANALYSIS

Through the 2018 EU-China Tourism Year (ECTY), the EU sought to increase the number of Chinese travellers, provide opportunities for more economic cooperation, and enhance cultural understanding. Under the ECTY framework, ETC released a series of reports that monitored Chinese air traveller trends to Europe. The project included an introductory report reviewing the past five years (2013 to 2017), three four-month reports, and a summary report presenting the Chinese air travel performance during 2018.

During the ECTY 2018, Chinese air arrivals to the EU grew by a healthy 5.1%. The EU maintained its status as the most visited region by Chinese travellers outside the Asia Pacific. EU destinations received 12% of total Chinese arrivals to worldwide destinations in 2018. The air capacity expansion with 32 new routes connecting EU and China largely fuelled the growth in number of Chinese air arrivals. The infographics are available on the ECTY 2018 website.

ETC CONTINUES THE LONG-TERM COLLABORATION WITH UN WORLD TOURISM ORGANISATION (UNWTO) IN PRODUCING MARKET INTELLIGENCE

ETC & UNWTO HANDBOOK ON EXPLORING HEALTH TOURISM

In recent years, health, wellness and medical tourism has grown exponentially. It is essential to understand wellness and medical tourism better to effectively seize its growth potential for sustainable tourism development. As part of a joint research programme, the European Travel Commission (ETC) and the World Tourism Organisation (UNWTO), with the support of the International Medical Travel Journal–Laing Buisson International, commissioned the handbook, Exploring Health Tourism, which proposes a consistent conceptualisation of health tourism and explores travellers’ motivations when looking for health-related services.

The Handbook provides a better understanding of health tourism at a global level, through the review of current and future practices from public and private tourism stakeholders. The study also presents a comprehensive taxonomy that serves as a reference for tourism operations in this field, and a mapping of publicly-available data sources that support destinations in monitoring the evolution of the demand and supply. The Handbook is a practical toolkit for national tourism organisations (NTOs) and destination management organisations (DMOs) to develop health tourism.

ETC & UNWTO STUDY ON GULF COOPERATION COUNCIL (GCC) OUTBOUND TRAVEL MARKET

The Gulf Cooperation Council (GCC) countries are a fast-growing market with the potential to make a significant contribution to European inbound travel flows in the coming years. To grasp this future opportunity, ETC and the UNWTO, with the sponsorship of Value Retail, commissioned a report which investigates the GCC outbound market, with a special focus on Europe as a tourism destination. The study delivered comprehensive insights about the state of the outbound travel in the GCC nations (travel evolution, outlook and the perception of Europe for this market). It depicts an inclusive profile of GCC travellers to Europe and includes experiences and wishes concerning travel to European destinations. Strategic recommendations to European tourist destinations on how to develop the right marketing approaches and messages for consumers from the GCC market are also provided.
2018 EU-CHINA TOURISM YEAR

The 2018 EU-China Tourism Year (ECTY) presented a unique opportunity to attract more Chinese travellers to European destinations off the beaten path. Agreed in 2016 by the Chinese Prime Minister and the President of the European Commission, ETC played a pivotal role from the outset of the campaign. Complementing the work of the European Commission and the Ministry of Tourism and Culture of China, ETC rolled out a 16-month programme of cooperative marketing activities designed to increase the appetite of Chinese Free Independent Travellers (FITs) for discovering new European destinations. The programme of activities benefited from EU co-funding and ECTY business and destination partners.

PARTNERSHIPS IN EUROPEAN TOURISM

ETC, in cooperation with the European Tourism Association (ETOA) and the European Travel Agents’ and Tour Operators’ Association (ECCTA), co-organised the Partnerships in European Tourism (PET) programme. The PET was made up of seven conferences and B2B matchmaking events in both Europe and China, specifically designed for small and medium tourism operators and businesses. In these events, 1,030 European suppliers met with 770 Chinese buyers, who were selected among top Chinese tourism operators. More than 21,000 one-to-one meetings were assigned over the course of the matchmaking events, which took place in Venice, Beijing, Berlin, Macau, London, Shanghai and Chengdu in conjunction with key international trade fairs, business summits and other ECTY related activities. 66 per cent of the participants said that PET had a positive impact on their work in China.

The satisfaction rate of Chinese operators was 93%.
**MEDIA HOSTING PROGRAMME**

Within the ECTY Media Hosting Programme, ETC hosted 14 Chinese influencers who produced and shared content about up to 14 different European travel experiences with their extensive fan bases. The programme was articulated around two different types of influencers: Chinese celebrities (Ambassadors), and Key Opinion Leaders (KOLs) such as bloggers, video bloggers and other content creators.

Four ECTY Ambassadors were nominated: Chinese actors Mary Ma, Timmy Xu, Elvis Han and singer Mao Buyi. They embarked on a Eurotrip and starred in a series of promo videos, advocating for ECTY and ‘Destination Europe’. Each followed a different itinerary and theme, such as art and culture, food and wine, natural beauty, fashion and design.

ETC partnered with fashion and lifestyle magazine Harper’s Bazaar China to carry out the Ambassador programme. The stories and content of the Ambassadors’ experiences were showcased under the ECTY Ambassador hashtag on Harper’s Bazaar’s and Trend Group’s online media channels, the celebrities’ own social media channels, mainstream media and VisitEurope.com channels in China.

The 14 thematic videos featuring nine European destinations that were produced and promoted on Chinese online media from October 2018 to March 2019 received more than 8.7 million views. ECTY Ambassadors were closely followed by Chinese fans, reaching more than 470 million impressions and appearing in 75 million discussions on Weibo, the premier Chinese microblogging site. The Key Opinion Leaders (KOL) programme allowed Chinese digital influencers to immerse themselves in ‘Destination Europe’ to create and share compelling stories about pan-European travel on their channels. Nearly 300 KOLs applied to take part, of which 10 were selected by ETC and sent on individually tailored trips in collaboration with the hosting DMOs and their partners. More than 370 pieces of content were produced from May 2018 to March 2019, garnering more than 106 million impressions.

**THEMATIC TRANSNATIONAL PROMOTIONAL CAMPAIGN**

ETC set up and managed a new scheme – known as the Joint Promotion Platform (JPP) – for co-investing in the most creative and thematic promotional campaigns conceived by consortia of public and private partners.

ETC published two calls for proposals which resulted in eight promotional campaigns receiving support of €1.1 million from the JPP. This amount was matched by the consortia partners which overall involved 28 public and private organisations from 17 European countries.

**TRAVEL TRADE TRADE SHOW PROGRAMME**

ETC coordinated the participation of 75 NTOs, regional DMOs and private industry partners from 26 different European countries in four major travel trade shows in China:

- COTTM, Beijing: April 16-18, 2018
- ITB China, Shanghai: May 16-18, 2018
- GITEF, Macau: October 23-24, 2018
- CITM, Shanghai: November 16-18, 2018

A total of 1,033 prescheduled appointments between co-exhibitors and Chinese-hosted buyers were arranged at the ECTY pavilion during these trade shows. In addition, ECTY was the official partner of these events.

**DIGITAL MARKETING DRIVE**

ETC carried out a major advertising campaign in cooperation with the biggest Chinese online travel agencies (OTAs); Ctrip, Tuniu and Tongcheng. A dedicated Europe pavilion (online flagship store) with destination information, travel itineraries and packages was created on each OTA, and advertised across their portfolio of online stores and social media channels. Dedicated pavilions of ECTY destination partners were also designed and integrated within the European one. In addition, ETC executed a social media campaign to increase awareness of Europe’s unique touristic assets. The campaign featured prominently on ETC’s own social media channels in China, namely on WeChat, the most popular Chinese mobile app, and Weibo, the premier Chinese microblogging site. Several mini and macro campaigns were run throughout the year to increase reach and drive engagement with pan-European travel content.

**EU-CHINA LIGHT BRIDGE**

More than 60 landmarks, iconic sites and venues across Europe turned a shade of red on March 2-3, 2018 to build a symbolic bridge of light to China in honour of ECTY. From renowned UNESCO World Heritage sites to lesser-known monumental buildings, sites in 18 countries took part in the initiative. Cultural events involving both local and Chinese communities accompanied the illumination of the landmarks in several locations, such as on the iconic Grand Place in Brussels, Belgium.

The Light Bridge was aimed at increasing awareness of lesser-known European destinations in China, and provided an opportunity for European and Chinese communities to better familiarise themselves with - and appreciate - each other's cultures. The initiative coincided with the celebration of the Lantern Festival in China which marks the end of the New Year’s festivities.

The Chinese pillar of the bridge was built on May 9, 2018 at the invitation of China National Tourism Administration, and on the occasion of Europe Day, a number of Chinese sites were illuminated with the EU flag’s shade of blue.

**EUROPEAN CHINA CERTIFICATION PROGRAMME**

In cooperation with the Chinese Certification Agency, the European Certification Programme was launched during ITB China, to certify European destinations and attractions.

**EU-CHINA CHRISTMAS MARKET IN CHENGDU**

The ECTY Christmas Market was held at the Guangdong Hall in Chengdu, Sichuan Province, from November 30 to December 2, 2018. The three-day consumer event brought European Christmas traditions to China, offering typical seasonal products, travel information and various activities for children. The ECTY Christmas Market welcomed more than 25,000 visitors, with six European countries and macro-regions represented at the market.

An interactive WeChat mini-programme (including destination information, small-scale competitions and virtual postcards) was developed to guide visitors across the market. QR codes to access the mini-programme were available at multiple spots throughout the venue. The application received nearly 12,000 unique page views.

**WELCOME CHINESE CERTIFICATION PROGRAMME**

European destinations and businesses were able to upgrade their service offerings for Chinese visitors and received the official Welcome Chinese Standard Certification thanks to this programme. The Welcome Chinese Certification is an exclusive worldwide standard, officially defined, recognised and implemented by the China Tourism Academy (CTA), China’s main governmental research and promotion institute. Different attractions and points of interest (such as museums, amusement parks, transport infrastructures and other tourism attractions) across Europe were certified.

**TRADE SHOW PROGRAMME**

ETC coordinated the participation of 75 NTOs, regional DMOs and private industry partners from 26 different European countries in four major travel trade shows in China:

- COTTM, Beijing: April 16-18, 2018
- ITB China, Shanghai: May 16-18, 2018
- GITEF, Macau: October 23-24, 2018
- CITM, Shanghai: November 16-18, 2018

A total of 1,033 prescheduled appointments between co-exhibitors and Chinese-hosted buyers were arranged at the ECTY pavilion during these trade shows. In addition, ECTY was the official partner of these events.

**EU-CHINA CHRISTMAS MARKET IN CHENGDU**

The ECTY Christmas Market was held at the Guangdong Hall in Chengdu, Sichuan Province, from November 30 to December 2, 2018. The three-day consumer event brought European Christmas traditions to China, offering typical seasonal products, travel information and various activities for children. The ECTY Christmas Market welcomed more than 25,000 visitors, with six European countries and macro-regions represented at the market.

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TRAVEL TRADE
DESTINATION EUROPE ROADSHOW IN BRAZIL
The Destination Europe roadshow visited three cities in the North East (Salvador, Recife and Fortaleza) and South-East (Rio de Janeiro, Belo Horizonte and Brasilia) regions of Brazil in March and October respectively.
Several new flight routes between these regions and Europe were inaugurated at the end of 2017 and beginning of 2018. To take advantage of this momentum, ten ETC Member NTOs and partners trained more than 400 operators and travel agents about new travel routes and experiences across Europe. The format of the roadshow in each city featured technical presentations followed by small-group meetings between each destination and the buyers. In addition to educating local trade partners, the roadshow contributed to fostering product development and reinforced ETC’s network in the largest South American outbound travel market.

THE NEW YORK TIMES TRAVEL SHOW
ETC coordinated the participation of five ETC members and associates in the New York Times Travel Show in January. The three-day trade and consumer show is the largest of its kind in the US. More than 30,000 travellers and industry professionals attended the event. The European Year of Cultural Heritage 2018 (EYCH) was prominently showcased at the ETC stand. The EYCH was also discussed during the Focus on Europe session.

PRESS & PR
IN THE NEWS
ETC activities throughout 2018 were widely covered by European and international trade and consumer media.
Throughout the year, ETC carried out an effective media and PR programme which secured more than 500 pieces of earned media in outlets like China Daily, TTG Asia, The Wall Street Journal, Skift, Euronews and Travel Weekly among many others. These articles and news featured stories about travel trends, travel tips, consumer behaviour, market performance and destination information.

29th EUROPE COMMUNICATION AWARD
The 29th Europe Communication Award recognised the outstanding work of Brazilian journalists and content creators in highlighting authentic travel experiences in Europe. The Brazil Operations Group together with experts in journalism and travel and tourism selected the winners in three categories among 250 entries.
The winners were announced during an award ceremony in the Italian Cultural Institute in Sao Paulo. More than 100 media and travel trade representatives took part in what is now the ETC’s flagship event in Brazil. Winners participated in a press trip to Serbia and Montenegro later in the year.

INTERNATIONAL MEDIA MARKETPLACE
ETC co-sponsored the participation of five member NTOs in the first edition of TravMedia’s International Media Marketplace (IMM) in Brazil. The global event for the media to meet travel and tourism brands took place in Sao Paulo in April. Each ETC member received a meeting space and an appointment set with journalists. The Chair of the Brazil Operations Group, Bernardo Cardoso, presented the organisation during the networking act.

CONSUMER MARKETING
TRAVEL INFLUENCER TRIP
Lucas Estevam from ‘Estevam pelo Mundo’ (estevampelo.mundo.com.br) was the influencer invited by the Brazil Operations Group to take part in a unique travel experience across the old continent. In cooperation with the NTOs of Belgium (Flanders), the Netherlands, Portugal and Switzerland, Estevam got to know first-hand cultural and natural destinations which are still unexplored by most Brazilian travellers in Europe. He documented his whole journey, from people and places, to food. The videos, images and stories of the trip received more than 150,000 engagements on social media.

EUROPE FOR CULTURE CAMPAIGN
The European Year of Cultural Heritage was the backdrop of an integrated digital marketing campaign in the US and Canada, in cooperation with Smithsonian, United, Air Canada and Rogers. The campaign raised awareness of Europe’s rich and diverse travel destinations and promoted 2018 as the year of unique cultural initiatives.
A dedicated page on VisitEurope.com served as a content hub providing consumers with information on cultural travel in Europe, including initiatives such as European Capitals of Culture, European Heritage Days, Cultural Festivals and others. Potential travellers were attracted to the platform via digital advertising, social media and email marketing.
The campaign was a major success, reaching over 11 million impressions and raising Europe’s year over year destination appeal by four per cent.

EUROPE E-ZINE
The Europe online magazine (e-zine) brought monthly travel inspiration and tips to 100,000 subscribers across North America. Each issue covered a different pan-European theme according to season, ranging from wine culture to secret gardens and UNESCO World Heritage sites in Europe. An average of 20 countries were featured each month. All editions of the Europe Magazine are published on VisitEurope.com and advertised on social media. The e-zine accumulated almost 400,000 page views throughout the year.
he members of the ETC Marketing Group (MKG) came together throughout the year to discuss and coordinate the roll-out of activities for the EU-China Tourism Year and the next steps in the implementation of the marketing strategy Horizon 2022. The Annual Meeting took place in Vilnius in February in conjunction with the Marketing Intelligence Group (MIG) Annual Meeting. Highlights of the programme included a joint workshop between the MKG and MIG aimed at identifying common relevant themes that differentiate ‘Destination Europe’ from its competitors, a keynote presentation by Tourism Australia about their marketing strategy, and a session for exchange of best practices which featured presentations from six ETC members.

Two follow-up work sessions took place in Brussels in March and October. These meetings served to advance the planning of the new strategy’s implementation, and provided opportunities for all ETC members to be involved in the decision-making process.

In addition, members of the MKG took part in Digital Tour – sion-making process. In March, the MKG presented the Horizon 2022 strategy, and were able to secure two follow-up work sessions took place in Brussels in March and October. These meetings served to advance the planning of the new strategy’s implementation, and provided opportunities for all ETC members to be involved in the decision-making process.

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A consequence of the new approach is that ETC will move forward from an obsolete one-size-fits-all approach regarding members’ and partners’ involvement in the organisation’s promotional activities. The MKG established a set of criteria for the selection of themes and priority target groups, while defining the roles, duties and benefits for all bodies of the organisation involved as well as for the Europe brand overall.

The Chair of the MKG and the Executive Unit met with the European Commission on several occasions throughout the year to present the Horizon 2022 strategy, and were able to secure support for at least the next two years. They also met with several potential partners from other European organisations, all of whom expressed their commitment to support the new strategy.

The ETC Marketing Group (MKG), in collaboration with the Market Intelligence Group (MIG), and input from the Board of Directors and the overseas Operations Groups, initiated the implementation of the new marketing strategy for ‘Destination Europe’, Horizon 2022. The new strategy implies a transition towards a new global thematic promotional approach, creating leverage for partnerships and digital focus. As opposed to a traditional geographic segmentation, a thematic approach means that product and experience will come first, rather than destinations. ‘Destination Europe’ shall therefore promote itself first and foremost as a collection of meaningful experiences that connect with people’s passions, and secondly shall refer to the places where it all happens. A thematic approach in a globalised world will allow ‘Destination Europe’ to attract visitors from across a broader range of niche markets than ever before.

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ETC’s Educational Forum on LGBTQ Tourism

ETC, in cooperation with VisitFlanders and the International Gay and Lesbian Travel Association (IGLTA), hosted an Educational Forum on LGBTQ Tourism in Brussels on 21 June. The Forum addressed ways to make Europe safer and more inclusive for LGBTQ travellers, shared best practices for reaching the diverse segments of this market, and discussed the future evolution of LGBTQ tourism in Europe. It was attended by more than 60 participants and featured speakers and experts from across Europe and the USA, including representatives of various destination marketing organisations who presented case studies from their respective destinations.

This event also marked the release of the Handbook on LGBTQ Tourism in Europe, a joint research project between ETC and IGLTA. Author Peter Jordan presented some of the report’s key findings in a keynote speech at the Forum. The report aims to understand the characteristics of the LGBTQ market segment, particularly the dynamics that influence the demand from this segment from five of Europe’s major source markets: Brazil, China, Japan, Russia and the US. It was revealed during the Forum that an open-minded culture topped the list of reasons for travellers to select a destination, and that LGBTQ events were the leading factor for their next visit.

EU-China Connectivity Summit

Within the framework of the 2018 EU-China Tourism Year, ETC, together with the Italian Government Tourist Board (ENIT) and Toscana Promozione Turistica, organised the EU-China Connectivity Summit at the historic Palazzo Vecchio in Florence, Italy on 6 September.

The event, EU-China Connectivity: Challenges and Opportunities, gathered representatives of the public and private sector with a strong focus on air connectivity with China, and was comprised of three panel discussions covering topical questions and issues related to Europe-China connectivity. Several challenges were recognised and addressed, such as open skies and free market access, visa requirements and airport and airspace capacity.

The event was attended by approximately 80 participants and speakers included representatives from key aviation associations EUROCONTROL, IATA, ACI, EU-China tourism authorities, as well as from major European airlines and airports.

Report on Visa Liberalisation for Chinese Travellers

Presently, China is one of the long-haul source markets for which visa-free access to the EU, including the Schengen area, is not available. This is despite the incremental rise in Chinese travel demand to Europe over the last ten years.

Considering the importance of this large outbound travel market, both in terms of generated arrivals and total travel expenditure, ETC has published a report quantifying the potential impacts on European tourism of visa facilitation for Chinese travellers. The results show that a full visa liberalisation scenario would contribute to an increase of Europe’s GDP by one per cent, and generate additional inbound spending of €12.5 billion p/a.

To assess the potential impact of visa facilitation, the report first undertakes an analysis of the main benefits and types of visa facilitation policy, and then applies them to travel patterns from China to EU27 (excluding UK) destinations. It argues that benefits can be gained from a targeted relaxation of visa policy towards China. The report is publicly available on www.etc-corporate.org.

Tourism Manifesto Advocates for Visa Facilitation and More Funding for Tourism

2018 marked another important year of ETC’s engagement in the European Tourism Manifesto, an initiative launched by European public and private stakeholders to raise the profile of the tourism sector among EU policymakers.

At the beginning of 2018, the Manifesto group issued a position paper calling for the urgent implementation of new visa rules. Manifesto stakeholders also participated in an exchange of views on common challenges and priorities with the UNWTO Secretary-General Zurab Pololikashvili. One of the main activities of the group was to advocate for direct investment in tourism in the EU Multiannual Financial Framework 2021-2027 in order to move towards a genuine EU tourism policy and strategic funding.

The Manifesto is available in 23 languages at https://www.tourismmanifesto.eu.
n January, ETC was proud to welcome the Netherlands Board of Tourism & Conventions (NBTC) back among its full members, making it the 34th National Tourism Organisation member of ETC. NBTC is responsible for branding, marketing and developing the Netherlands on a national and international visitor level. It has recently implemented an innovative HollandCity branding, marketing and development strategy based on the synergy between districts, storylines and events, with the long-term objective of reducing seasonality and redistributing tourism across the entire country. This new narrative of the destination, and new approach in presenting the Netherlands to tourists and business visitors, is summarised in the slogan 'supporting the known, introducing the new', and continues the promotion of popular destinations and cities, and familiarising tourists with lesser-known destinations. Additionally, ETC was pleased to welcome three new organisations to its associate membership programme in 2018; CrowdRiff, Confcommercio and Airbnb.

CrowdRiff is an AI-powered visual marketing platform, purpose-built for marketing teams in travel and tourism brands. Using CrowdRiff, marketers can discover, collaborate on and deliver top-performing visuals across every marketing channel. It works with more than 500 travel and tourism brands globally, including Holland Marketing, Visit Harrogate and Destination British Columbia.

Confcommercio-Imprese per l'Italia, the Italian General Confederation of Enterprises, Professions and Self-Employment, today accounts for more than 700,000 enterprises, with almost 2,700,000 employees, making it the largest employer organisation in Italy. In the tourism sector, Confcommercio groups hotels, public establishments, travel agencies, tour operators, incentive services, campsites, tourist villages, tourism-hotel residences, time-shares, bed & breakfasts, youth hostels, beach resorts, nightclubs, marinas and boat hire enterprises and meeting planners.

ETC President Peter De Wilde presents a certificate of membership to Jos Vranken, CEO of NBTC.

Founded in 2008, Airbnb exists to create a world where anyone can belong anywhere, providing healthy travel that is local, authentic, diverse, inclusive and sustainable. Airbnb uniquely leverages technology to economically empower millions of people around the world to unlock and monetise their spaces, passions and talents to become hospitality entrepreneurs. Airbnb’s accommodation marketplace provides access to more than five million unique places to stay in more than 81,000 cities and 191 countries. With Experiences, Airbnb offers unprecedented access to local communities and interests through more than 15,000 unique, handcrafted activities run by hosts across more than 1,000 markets around the world. Airbnb’s people-to-people platform benefits all its stakeholders, including hosts, guests, employees and the communities in which it operates.

ETC looks forward to a long and fruitful collaboration with our newest members.

The ETC is constituted under Belgian law as an International Association Without Lucrative Purpose (AISBL/IVZW). Being a non-profit organisation, the 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 2018, ETC was awarded an operational grant from the European Commission focused exclusively on promotion of ‘Destination Europe’ in China to seize the unique opportunity offered by the 2018 EU-China Tourism Year.

**TOTAL 2018 BUDGET**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head Office</td>
<td>€872,368</td>
</tr>
<tr>
<td>Marketing Activities</td>
<td>€3,276,539</td>
</tr>
<tr>
<td>Research</td>
<td>€242,499</td>
</tr>
<tr>
<td>Advocacy</td>
<td>€44,196</td>
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<tr>
<td>Marketing group</td>
<td>€12,989</td>
</tr>
<tr>
<td>Other</td>
<td>€24,100</td>
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</tbody>
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**2018 INCOME OVERVIEW**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership fees</td>
<td>€1,089,936</td>
</tr>
<tr>
<td>Membership ETC Members opt-in</td>
<td>€182,506</td>
</tr>
<tr>
<td>European Commission grant</td>
<td>€2,386,538</td>
</tr>
<tr>
<td>Other</td>
<td>€798,722</td>
</tr>
</tbody>
</table>

**TOTAL INCOME** €4,459,702

**FUNDING**

**ETC Members opt-in** €182,506

**European Commission grant** €2,386,538

**Membership fees** €1,089,936

**Other** €798,722

**TOTAL INCOME** €4,459,702

**Global marketing activities** €11,111

**Marketing group** €12,989

**Research** €242,499

**Advocacy** €44,196

**Head Office** €872,368
WHO IS WHO AT ETC

WHO WAS WHO AT ETC IN 2018

PRESIDENT

Peter De Wilde (Belgium - Flanders)

BOARD OF DIRECTORS

Jos Vranken (Netherlands)

Petra Stöba (Austria)

Karmalis Charalampos (Greece)

Héctor Gómez Hernández (Spain)

VICE-PRESIDENTS

Renaldas Čiužas (Lithuania)

Robert Andrzejczyk (Poland)

Marija Labovic (Serbia)

Jan Olsen (Denmark)

Antonio Preiti (Italy)

Petra Hedorfer (Germany)

Michel Vankeerberghen (Belgium - Wallonia)

EXECUTIVE UNIT

Executive Director

MARKETING GROUP

Market Intelligence Committee

GENERAL MEETING

BOARD OF DIRECTORS

33 Members

3 Vice-Presidents

10 Members

ETC MEMBER ORGANISATIONS

FULL MEMBERS

Austria

Belgium (Flanders)

Belgium (Wallonie)

Bulgaria

Croatia

Cyprus

Czech Republic

Denmark

Estonia

Finland

Germany

Greece

Hungary

Iceland

Ireland

Italy

Latvia

Lithuania

Luxembourg

Malta

Monaco

Montenegro

The Netherlands

Norway

Poland

Portugal

Romania

San Marino

Serbia

Slovakia

Slovenia

Spain

Switzerland

ORGANISATION STRUCTURE

EXECUTIVE UNIT

MARKETING GROUP

INTELLIGENCE GROUP

OPERATIONS GROUPS

USA, Canada, China, Brazil

ASSOCIATE MEMBERS

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