



EUROPEAN TRAVEL COMMISSION

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PRESIDENT'S FOREWORD

REBUILD THE EUROPEAN TOURISM SECTOR IN THE AFTERMATH OF THE COVID-19 PANDEMIC

This is my mandate and the reason I took over the presidency of ETC in a period when European tourism faces one of its biggest challenges. Now, more than ever, we need joint efforts and strong coordination.

Our role is to ensure that tourism has a stronger voice in Europe, through better coordination among countries, in view of a quick and sustainable recovery. ETC has to be the most influential voice in Europe and the world, leading the sector's transformation towards the responsible, sustainable, digital and resilient tourism of tomorrow. Being fully aware of the challenges we all face, I strongly believe that the long track record of ETC, together with the commitment of its members, will help us reconstruct the confidence in tourism and reinvent the sector in Europe.

This crisis has demonstrated the real economic and social value of travel and tourism in Europe giving the visitor economy the attention it deserves. Tourism lies at the heart of the European economy and everyday life of citizens in Europe.

For many years the sector has been taken for granted and its value was overlooked. As stated by UN Secretary General António Guterres, indeed "tourism is itself one of the wonders of the world" – a perfect platform to build bridges, reconnect people and be a driver of economic recovery and social wellbeing.

On another note, during this crisis we have also learned how vital European cooperation and coordination is. We were able to experience again what it means to live with borders and travel restrictions in Europe and what a crucial impact it has on our lives and businesses.

Only by working together in the spirit of European solidarity will we be able to overcome this unprecedented crisis. We need to capitalise on this momentum, speak with one voice and ensure that tourism gets the support it deserves to foster the sector's transformation. Even though triggered by such a dramatic crisis, we have a real opportunity now to reinvent the tourism sector of tomorrow.



We have been talking for too long about sustainable growth, climate change, digitalisation and innovation. This is a real opportunity to press the reset button, challenge pre-established models and take all of these matters seriously by defining ambitious and quantifiable goals and implementing effective action plans.

Our mission is to promote tourism as the key element to regenerate our countries and increase the competitiveness of Europe as a touristic destination.

I trust our members and partners will support us on the path to recovery and transition.

Yours sincerely,

Luis Araijo
ETC President

EXECUTIVE DIRECTOR'S MESSAGE

Our role is not to forecast the future, but to shape it.

Antoine de Saint-Exupéry



Undoubtedly, 2020 was an annus horribilis for European travel and tourism. Struck by the global health crisis, international tourist arrivals to Europe dropped to the lowest-measured records characterised by fragmented travel restrictions and lack of coordination. Yet, in the end of 2020, the roll-out of vaccines provided an inflection point and grounds for optimism for the future. Together with improved testing regimes and the use of digital tools to facilitate international mobility, vaccination is expected to stimulate consumer confidence and hasten the easing of movement restrictions in the second half of 2021.

Nevertheless, a return to typical international travel demand will be gradual and will follow a very different pattern, which will be full of more cautious and conscious decisions at consumer and supply levels. This unprecedented situation made us reflect upon the interconnection and the complexity of tourism as an ecosystem dependent on many other transversal sectors, in particular health and mobility.

Even though the current situation is challenging, at ETC we look forward and are adapting to the circumstances. We must do this not only by reconsidering our own activities and priorities, but above all, by anticipating the future. This is difficult as we often find ourselves clinging to long-established processes and patterns. The hope that things will return to how they once were, provide us with a sense of security but this is preposterous as it involves looking back, and right now, we must move forward. We must try new models, exchange ideas and best practices, question ourselves, involve the

next generations, and demonstrate adaptability, flexibility, and agility. If we succeed in doing so, there is an opportunity to emerge stronger, clearer, and quite likely, more united.

Let us therefore critically question our past actions and behaviour, without losing our confidence, trust, and belief in a better future. I'm convinced that by letting go, a much better tomorrow lies ahead of us.

I would like to thank fully hearted our President, Vice-Presidents, Board of Directors and members of our General Meeting for keeping the strong spirit of collaboration during these challenging times. My last words go to my team at the Executive Unit in Brussels for their outstanding work this year, for their resilience and their perseverance.

Yours sincerely,

Eduardo Santander

ETC Executive Director

ETC EXECUTIVE UNIT¹

The Executive Unit is based in Brussels and operates in the following fields – Marketing and Communication, Public Affairs, Research, Partnerships, Finance and Administration.

Every year, ETC includes 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.

The Executive Unit is proud to include staff members and trainees from eight different countries – Belgium, Bulgaria, Ireland, Portugal, Romania, Russia, Spain and the UK.



Teodora Marinska
Head of Finance
and Public Affairs



Miguel Gallego
Head of Marketing
and Communication



Jennifer Iduh
Head of Research



Iulia Niculică
Funding, Procurement
and Development Manager



Lyublena Dimova
Research Manager



Sophie Mc Guirk
Membership
and Events Manager



Yasemin Volders
Project Manager Marketing



Tatiana Veselova
Corporate Communications
and Public Affairs Manager



Anna Bellmàs
Project Manager Marketing



James Arnold
Project Manager Research



Diogo Paciência
Digital Marketing Trainee

¹ Updated according to current structure at the date of publication in May 2021

ETC'S RESPONSE TO COVID-19

Since the beginning of the pandemic, ETC has been continuously monitoring developments related to the COVID-19 crisis and its impact on the tourism sector to support and inform its Members. ETC has been working closely with the European Commission and other stakeholders in the sector to mitigate the effects of the crisis and pave the way towards a swift recovery. Additionally, ETC has joined forces with its associate members and partners to provide useful webinars and data to help NTOs and DMOs navigate challenges now and in post-crisis times.

Since the first days of the COVID-19 outbreak, the Executive Unit established a mailing list of CEOs and communications managers of member NTOs to facilitate the exchange of information on measures adopted by different ETC member countries through an email thread.

January 2020

JANUARY
–
MARCH

KEEPING MEMBERS
INFORMED AND FIRST
REACTIONS



First meeting of the Informal Network on COVID-19 with a guest intervention by Mr Weimin Che, Minister-Counsellor at the Mission of China to the EU

February 2020

Since February 2020, ETC has been co-organising together with the European Commission an ad-hoc informal network to discuss the impact of COVID-19 on tourism and the response required by both public and private sectors. The first meetings were dedicated solely to the Chinese market, while as the crisis progressed the focus switched to the situation in European tourism. The informal group gathers a limited number of key European professional associations in tourism and travel, including airlines, cruise lines,

hospitality sector, travel agents and tour operators, travel tech as well as representatives of WTTC and UNWTO. ETC hosted 32 meetings of the ad-hoc network in 2020 and continues co-organising the network in partnership with the Commission in 2021. The outcomes of the regular discussions of this network are transmitted to the cabinet of the Commissioner for Internal Market Thierry Breton, as part of the briefings guiding the European Commission Coronavirus response team.

March 2020

The Executive Unit was monitoring developments related to the COVID-19 pandemic and keeping ETC members up to date through regular briefings and monthly newsletters. The briefings included updates on the latest developments with restrictions and border closures in Europe, an overview of ETC's advocacy activities, EU response to the crisis as well as the latest impact assessments and reports.

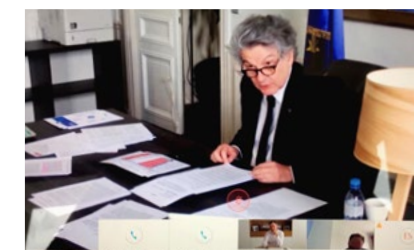
In March, ETC joined a weekly **Travel & Tourism Task Force on COVID-19** organised by WTTC. ETC Executive Director Eduardo Santander represents European NTOs, exchanges the latest updates and coordinates actions with key international public and private stakeholders, including UNWTO, OECD, PATA, ICAO, ACI and CLIA.

ETC created a **bespoke COVID-19 page** on [VisitEurope.com](#) to provide consumers with an easy and direct access to information about travel conditions and measures in place in each European country. The page quickly became a hub providing links to multiple useful and practical resources to inspire future safe travels.



ETC has been closely cooperating in its response to the crisis with the European tourism stakeholders through the **European Tourism Manifesto** alliance (chaired by ETC). In March, the European Tourism Manifesto alliance released a [statement](#) calling for the implementation of urgent measures to reduce the devastating impact of the COVID-19 outbreak on the sector and stressing that support for tourism must be a priority in the crisis response, recovery plans and actions of affected economies.

Following the announcement from the US of a travel ban on non-US citizens from Europe to the United States, ETC together with ETOA, USTOA and ECTAA published a [statement](#) urging bilateral conversations between European and US authorities to review the travel suspension from Europe to the United States.



In April, ETC Executive Director Eduardo Santander took part in two high-level virtual meetings with EU Commissioner for Internal Market Thierry Breton and a small group of key EU tourism stakeholders. ETC called on the Commissioner to invest in brand Europe and a Europe-wide tourism campaign, promoting the force of travel to help local communities and save tourism in Europe. Eduardo Santander also participated in a digital meeting with Commissioner for Transport Adina Valean to support the Commission's efforts in coming up with an integrated concept on how to restart transport links for the benefit of tourism.

April 2020

APRIL
–
MAY

FIRST LOCKDOWN
AND MITIGATING
THE IMPACT



In April, ETC and WTTC joined forces calling on EU Member States to lead a united and coordinated recovery response to the COVID-19 crisis with four key principles to achieve faster recovery, namely a common response and well-coordinated approach across the EU, a recovery plan, an industry toolbox to resume travel in Europe and supportive measures.

To monitor the impact of COVID-19 on tourism within Europe, ETC partnered with its associate member ADARA, who provided regular insights exclusively available for ETC members. ADARA has developed a Travel Insight Report for ETC members. The reports provide weekly information on the volume of flight and hotel searches/bookings to Europe (international and domestic). Insights also detail booking projections illustrating potential interest or opportunity for communication.

At the request of several members, the Executive Unit rolled out a survey for members on the response of their respective NTOs and national governments to the COVID-19 pandemic. The survey focused on the immediate response of NTOs to the crisis as well as future plans and shifts in marketing and promotional activities, and outlook for the remainder of 2020. It was completed by 24 NTOs and results were shared with members at the beginning of May.

May 2020

ETC joined forces with several of its associate members and partners to deliver a series of webinars for its members and the wider network of travel and tourism professionals during the height of the pandemic. The webinars aimed to provide new data on the tourism landscape, tips for crisis management, and upskilling opportunities. Partners included ADARA, Sojern, ForwardKeys, CrowdRiff, Tourism Economics, and TCI Research with topics ranging from travel sentiment and the impact of the pandemic on the tourism industry to best practices in sustainability for DMOs. The webinars were well received with a total of over 1000 registrations across the 10 webinars which were organised. The recordings and presentations of all the webinars are available on the ETC corporate website.

On 9 May 2020, on the occasion of Europe Day, members of the European Heritage Alliance (including ETC) launched the Europe Day Manifesto 'Cultural Heritage: a powerful catalyst for the future of Europe'. Through this document, the members of the alliance express their readiness to contribute to Europe's immediate social and economic recovery, as well as to the longer-term advancement of the European project. The Europe Day Manifesto supports the appeal for a major "EU tourism rescue plan", which should include special measures for the revival of cultural tourism.

The Executive Unit prepared several policy briefings on EU legislative initiatives to inform its members. Namely, ETC summarised the EU Communication on Tourism and Transport in 2020 and Beyond, and the Communication on the EU Budget Powering the Recovery Plan for Europe. It additionally prepared an overview of all EU State Aid schemes to support tourism and aviation in the context of the COVID-19 pandemic.

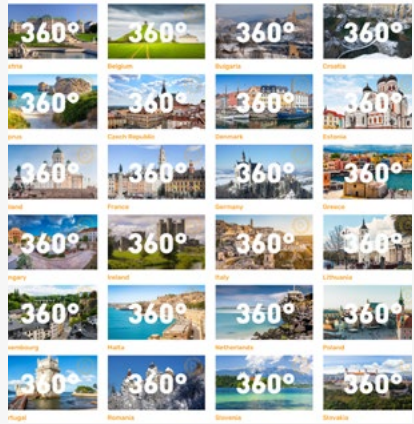


The Executive Unit launched a dedicated website page on ETC's COVID-19 response. The interactive page replaced the monthly briefings with updates to members. It gathers latest figures and data on the pandemic, market intelligence, EU actions to support tourism and health and travel guidelines from ETC members. The page also provides access to all related ETC activities, webinars and reports.



The European Tourism Manifesto alliance chaired by ETC issued a statement welcoming the European Commission's guidance on how to safely resume travel and reboot Europe's tourism in 2020 and beyond. The over 60 travel & tourism stakeholders of the alliance agreed that this package represents a first and important step to facilitate travel in Europe, support the sector's recovery from this unprecedented crisis and enable a more sustainable tourism ecosystem in the future. Among the main messages, the supporting organisations called on national governments to urgently follow the European Commission's recommendations and to continue to aid and assist the tourism ecosystem to overcome this crisis and strengthen its resilience in the long run.

ETC launched a new video series entitled "Europe in 360°" which included short videos of both popular and lesser-known European landmarks. The interactive content aimed to generate wanderlust by allowing consumers to virtually explore Europe from the comfort of their homes. This series was regularly distributed on VisitEurope.com's consumer social media channels.





ETC teamed up with Euronews to develop a brand campaign entitled **"We are Europe"**. The campaign launched in mid-June, as travel restrictions across Europe started gradually being eased. This was the first ever campaign of ETC targeted primarily towards domestic (intra-European) markets.

The one-minute spot was designed to inspire people to get ready to travel again by addressing the emotional journey many of us were on during the COVID-19 lockdown period and to celebrate Europe's diversity and the unique power of travel to bring people together.

June 2020

The film was developed in six different language versions which ran for one month on Euronews' TV network and live stream platforms, as well as on ETC's and industry partners' social media platforms. The TV campaign is estimated to have reached 149.1 million individual impacts across Europe and was watched over 425,000 times on the web and social media. The PR campaign on the occasion of the launch of the film also received broad media coverage across Europe and even overseas.



ETC answered to the **European Economic and Social Committee's survey on the Impact of COVID-19 pandemic on the tourism sector** to emphasise the significant losses in the tourism value chain and suggest national and European policy priorities for the recovery of the tourism sector. The findings of this survey fed [the opinion "Tourism and transport in 2020 and beyond"](#) adopted by the Committee in September and presented to the European Commission and other EU institutions.

In August, ETC launched a **new research project "Monitoring Sentiment for Domestic & Intra-European Travel"** to track the sentiment, drivers and behaviours for domestic and intra-European travel. Results are based on quantitative market research among frequent travellers in ten high-volume European source markets - Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland, and Austria. The key findings and strategic recommendations for destinations and tourism authorities were made available in [monthly reports](#) in October, November and December 2020. This project is co-funded by the European Union and continues into 2021.



PUSHING FOR HARMONISATION OF TRAVEL RESTRICTIONS

The European Tourism Manifesto alliance chaired by ETC **published a statement calling on Member States to urgently agree on harmonised travel restrictions** and ensure swift implementation to help the sector survive this unprecedented crisis.

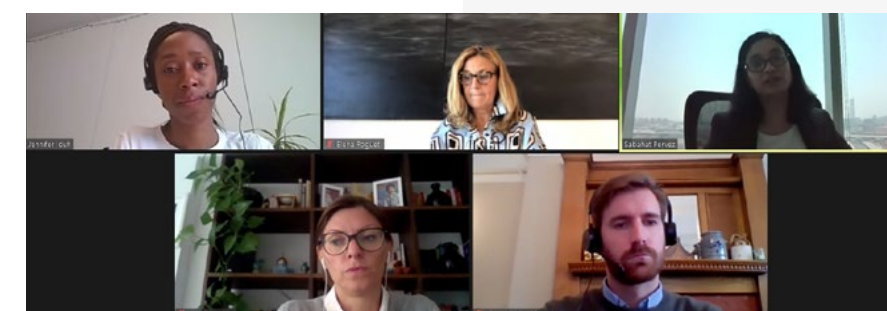
September 2020



ETC Head of Public Affairs Teodora Marinska participated in [the meeting of Transport and Tourism \(TRAN\) Committee of the European Parliament](#) with travel and tourism stakeholders on 23rd September. ETC discussed with MEPs the dire situation facing the sector and ways to overcome this unprecedented crisis towards a sustainable recovery. Following the discussion, the TRAN Committee published a [joint statement](#) reiterating that the tourism sector needs EU-level coordination and substantial support to give SMEs a chance of survival.

The virtual [International Seminar on the Tourism Path to Recovery Post-COVID-19](#) was held on 10-11 September, jointly organised by ETC, European Cities Marketing (ECM) and MODUL University Vienna. The seminar provided a platform for knowledge-sharing on mitigating strategies to assist in the sustainable recovery of tourism and explored how innovation and big data can support the recovery of the tourism industry.

In September, ETC together with over 20 travel and tourism bodies as well as unions across Europe united [in an unprecedented call for European Commission President Ursula von der Leyen to replace quarantine restrictions with an EU Testing Protocol for Travel](#). In an open letter the groups, who represent over 5,000 member companies and their workers, point to a continued lack of coordination and diverging travel restrictions as crippling their businesses.



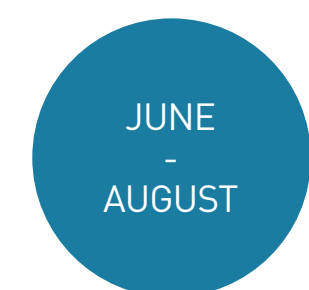
August 2020

ETC issued a [press statement in partnership with associate member Sojern](#) calling on EU governments to **better coordinate their COVID-19 recovery efforts** by adopting a harmonised approach to lifting or reinstalling restrictions and safety measures, as tourism confidence plummeted to a record low across the continent. To support the call, Sojern provided most recent search and booking data across three aspects of the European tourism market – domestic travel, travel between European countries and international trips to Europe.

July 2020

On 1st July, the European Tourism Manifesto alliance chaired by ETC issued a [statement](#) calling for an extension of the deadline for implementation of the **Strong Customer Authentication (SCA)**. The new SCA requirement aims to ensure that electronic payments are performed with multi-factor authentication.

While the alliance commended the objectives of the SCA requirements, it also underlined that a rushed transition to the new system will lead to a multitude of payment problems in 2021.



SUMMER REOPENING AND FRAGMENTED MEASURES

In September, ETC released a [“Handbook on COVID-19 Recovery Strategies for National Tourism Organisations”](#). The handbook explores the mitigation and recovery strategies deployed by NTOs across Europe during the COVID-19 pandemic. The aim of the handbook is to share knowledge and provide NTOs with strategic recommendations to rebuild the European tourism sector in a more resilient and sustainable way, restore travel confidence and support the development of a new tourism ecosystem.



In September, ETC partnered with **ForwardKeys** to support members with data on COVID-19 travel impact on Europe. ForwardKeys provides ETC members with a monthly summary which monitors flight bookings to Europe from different regions of origin.



ETC played an active role in the [European Tourism Convention](#) organised by the European Commission on 12th October. ETC Executive Director Eduardo Santander was appointed as a rapporteur for the workshop on [Safe & Seamless Tourism Experiences](#) and presented the outcomes of the discussion at the plenary session.

October 2020

After his election at the 99th General Meeting in September 2020, ETC President Luis Araujo met with several associations of the tourism sector headquartered in Brussels (ECTAA, ETOA, A4E) in order to discuss their policy priorities and find synergies in response to COVID-19 crisis and possibilities for cooperation with the ETC advocacy agenda.

In October, the European Tourism Manifesto alliance chaired by ETC issued a [statement](#) urging EU Member States to make tourism a strategic element in their national recovery plans in order to harness the potential of the sector to generate jobs and growth, and to reap the benefits from green and digital transitions. The supporting organisations also stated their readiness to help Member States in drafting their recovery plans to ensure that the proposed reforms and investments create a favourable environment in which tourism can develop in a sustainable and resilient way.

ETC Executive Director Eduardo Santander presented ETC's view on major challenges for destination marketing at the **19th European Tourism Forum** organised virtually by the German Presidency of the Council of the EU on 23rd October.

ETC President Luis Araujo took part in a virtual round table organised by the International Air Transport Association (IATA) with the objective of **cooperating with health authorities in Europe to re-establish safe travel across the region** and to find commonly acceptable policy solutions to be implemented in a harmonised manner (urgent implementation of more effective and rapid testing regimes that alleviate the need for quarantine).

November 2020

On 17 November, ETC partnered with Bloom Consulting for a **webinar on the Impact of the COVID-19 Pandemic on National Tourism Brands**. The webinar indicated which National Tourism Brands within Europe and other world regions are most affected by the crisis and which brand dimensions are the most resilient to the current circumstances. During the session, a new concept labelled 'the Brand-Nought' was explained, which serves as a tool that measures the impact of the crisis on the dimensions of Tourism, Investment, Talent, Export and General Reputation.

In order to **secure EU support and sufficient funding for promotion of Destination Europe**, ETC sent a letter to the European Commission and the European Parliament calling for more investments in marketing and demand stimulation to kick start the tourism recovery in Europe in the aftermath of the COVID-19 crisis.

NOVEMBER
-
DECEMBER

SECOND LOCKDOWN AND PAVING THE WAY TO SUSTAINABLE RECOVERY

In November, the European Tourism Manifesto alliance chaired by ETC published a [provisional paper](#) (later updated in 2021) **presenting a non-exhaustive list of reforms and investment ideas related to travel and tourism** that would contribute to making EU countries' economies more resilient. These investments are grouped according to the EU flagship initiatives listed in the European Commission's *Guidance to Member States on Recovery and Resilience Plans* and can be integrated by Member States in their national recovery plans.

December 2020

In December, ETC launched the exclusive **members-only Webinar Series 2.0**, partnering with ADARA hosting the first webinar. This series will be continued into 2021 featuring ETC's associate members providing solutions and best practices to help DMOs transform from marketing to management organisations.

ETC's digital communications were recognised by a top Brussels public affairs consultancy Cambre Associates as **“Best in Class” for the COVID-19 response in 2020**. ETC was selected among 30 digital champions out of 570 EU associations.

To establish a closer dialogue and cooperation with EU health and transportation authorities, ETC in partnership with the European Tourism Manifesto alliance, UNWTO and WTTC sent a **letter to the European Centre for Disease Control (ECDC) and the European Union Aviation Safety Agency (EASA) welcoming their Guidelines for COVID-19 testing and quarantine of air travellers** published on 2nd December 2020. The organisations congratulated ECDC and EASA on the publication of these comprehensive guidelines which provided a clear pathway for EU Member States to make informed decisions on travel measures during the COVID-19 pandemic. The letter follows ETC's [press statement](#) welcoming the ECDC-EASA guidelines and calling on EU Member States to swiftly implement these recommendations for a coordinated approach to travel in Europe.



EUROPEAN TOURISM TRENDS & PROSPECTS

PERFORMANCE 2020 & OUTLOOK 2021

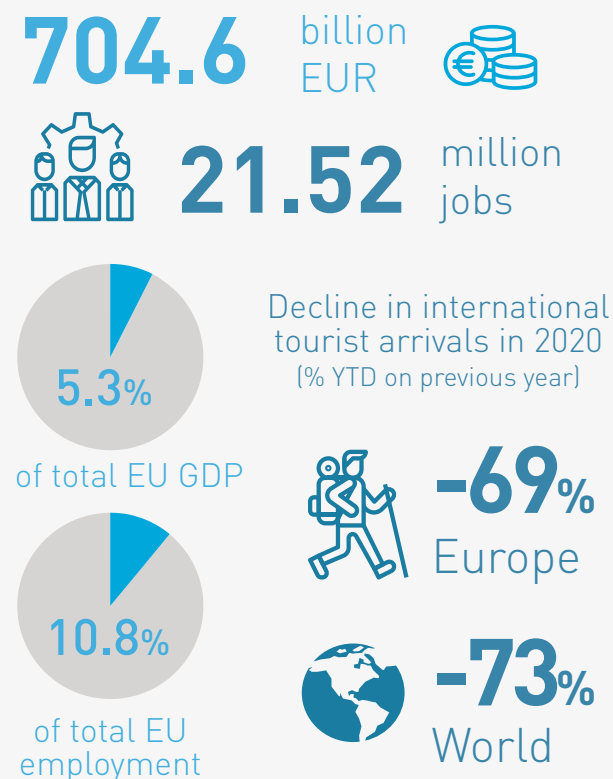
The COVID-19 pandemic has devastated the travel and tourism industry worldwide, with knock-on effects that have been unprecedented in scale and duration. In 2020 international tourist arrivals to Europe plummeted 69%¹ over 2019 caused by severe travel restrictions which resulted in substantial losses in visitor arrivals. The region now holds a 59% share of global international tourist arrivals, as Asia Pacific remains closed to tourism. According to the World Economic Outlook January 2021 update, the Euro Area economy is estimated to have fallen 7.2% in 2020 although projections point at a 4.2% increase in 2021.

A plunge in demand from long-haul markets significantly impacted Europe's travel industry in 2020. Enduring travel restrictions and weakened sentiment towards destinations that require longer journey times, weakened the demand for long-haul travel. The introduction of travel bans between the US and the EU contributed to a drop over 70% in US arrivals to all European destinations in 2020.

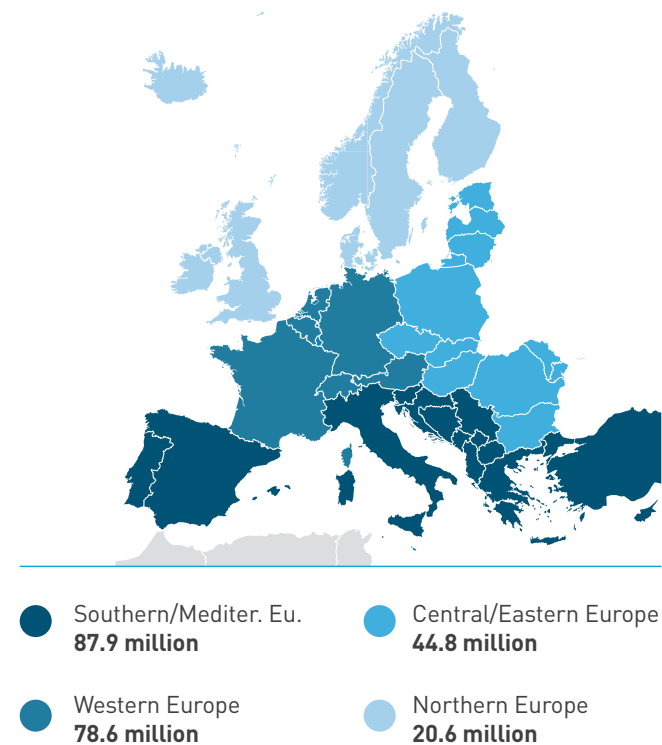
Arrivals from China also saw a steep fall as the country maintains strict restrictions on outbound travel. A decrease of over 70% was registered for Chinese arrivals across all European destinations in 2020.

As the COVID-19 pandemic enters its second year, the incidence remains high in European countries.

IMPACT OF TOURISM ON THE EU ECONOMY IN 2020 (total contribution)



International Tourist Arrivals by European Subregion in 2020



Sources: UNWTO & WTTC



Nevertheless, the roll-out of vaccines worldwide have shifted the balance of risks to the upside and provided some grounds for optimism for the 2021 outlook which, together with improved test-and-trace schemes, is expected to encourage consumer confidence, accelerate the easing of movement restrictions and boost the travel bounce-back. A return to more typical travel demand patterns will be gradual and expected towards the second half of the year 2021 although pre-crisis levels will not be fully reached until 2024.

Supporting the 2021 outlook, ETC's survey on intra-European travel sentiment indicates that persistent restrictions on travel activity have stimulated a substantial amount of pent-up demand. [February's survey](#) shows that 56% of respondents intend to travel within the next six months either domestically or within Europe. Ensuring safe travel opportunities should become a priority for destinations as the same survey indicates that 67.3% of respondents feel safe and relaxed enough to enjoy their trip when strict safety protocols are in place.

COVID-19 has imposed a new economic, social, and digital reality calling for an agile response among European nations. It is now crucial that European destinations join forces and agree on common solutions, not only to curb the spread of the virus but also to support tourism's sustainable recovery, restore traveller's confidence, and protect the millions of businesses, jobs, and enterprises that have been affected, so they can survive the economic fallout. The European Commission has presented a certification scheme for vaccinated, recovered or tested travellers in Europe, the "Digital Green Certificate" aimed at gradually allowing European citizens to move safely in the European Union and further afield.

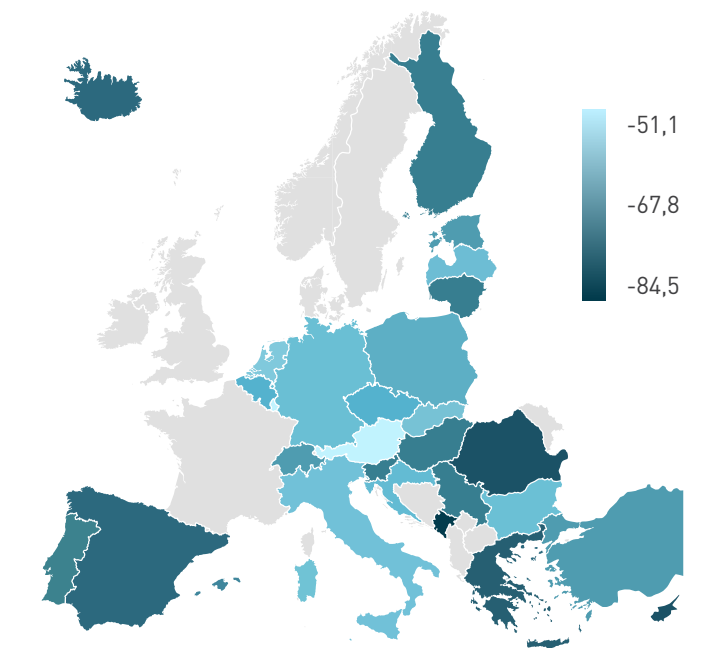
Throughout 2020, the different issues of the European Tourism Trends & Prospects (Quarterly Reports) monitored the impact of the COVID-19 health crisis on the tourism sector and the economic environment. Each report also examined, as part of its "special feature" recent trends and

how travel activity is expected to return in 2021 amid the pandemic. The publications are supported by a wide range of visually appealing and user-friendly dissemination materials that summarise the report findings, such as infographics, videos, slides, etc.



Check them out on the [ETC corporate website](#) and share!

Foreign visits to select destinations 2020 year-to-date*, % change year ago



Source: TourMIS

¹ UN World Tourism Organization (UNWTO)

ETC MARKET INTELLIGENCE GROUP

MEMBERSHIP

The Market Intelligence Group (MIG) brings together the Research Directors of ETC's 32 member National Tourism Organisations (NTOs). An essential event in the calendar of the MIG is the group's Annual Meeting held in February, with the aim of establishing new research programmes for the upcoming year.



5th MARKET INTELLIGENCE GROUP (MIG) AND MARKETING GROUP (MKG) ANNUAL MEETING

The 5th Market Intelligence Group (MIG) & Marketing Group (MKG) Annual Meeting took place on 6-8 February in Sliema, Malta. The meeting gathered Research and Marketing Directors of ETC member countries, as well as representatives of ETC's research partners – the World Tourism Organization (UNWTO), the European Tourism Association (ETOA) and the World Travel & Tourism Council (WTTC). Delegates from MMGY Global, the European Tourism Futures Institute, Toposophy, Market Vision and Kairos Futures were also present. The meeting offered ETC members a chance to learn and exchange knowledge and expertise on the latest trends in research and tourism.



EVENTS & WEBINARS CALENDAR 2020

- ETC Webinar – European Tourism Trends & Prospects – **January, April, June and October**
- MIC Meetings – **April, June, September and December**
- ETC Webinar – Study on Generation Z Travellers – **May**
- 16th TourMIS Workshop and International Seminar on the Tourism Path to Recovery Post-COVID-19 – **September**
- ETC Webinar - The Impact of the COVID-19 Pandemic on National Tourism Brands - **November**



THE MARKET INTELLIGENCE GROUP (MIG) IN 2020

- **Chairperson:** Sérgio Guerreiro (Portugal)
- **Vice-Chairperson:** Nessa Skehan (Ireland); Tania Sultana (Malta)
- **Co-ordinators:** Jennifer Iduh (ETC Executive Unit); Lyublena Dimova (ETC Executive Unit); James Arnold (ETC Executive Unit)

MARKET INTELLIGENCE COMMITTEE IN 2020

- Steven Valcke (Belgium - Flanders)
- Vincent Nijs (Belgium - Flanders)
- Saša Popovac (Croatia)
- Dijana Radic Milosevic (Denmark)
- Piret Kallas (Estonia)
- Joachim Scholz (Germany)
- Nessa Skehan (Ireland)
- Povilas Junas (Lithuania)
- Tania Sultana (Malta)
- Marieke Politiek (the Netherlands)
- Patrícia Seguro (Portugal)
- Sérgio Guerreiro (Portugal)
- Nataša Hočevár (Slovenia)
- Ana Špik (Slovenia)
- Álvaro Blanco Volmer (Spain)

PARTNERS

- ETOA - Tim Fairhurst/Tom Jenkins
- UNWTO – Sandra Carvão/Michel Julian

MIC MEETINGS



The Market Intelligence Committee (MIC) comprises a group of volunteers from the research departments of 12 ETC NTO members. The MIC gathers four times per year and all meetings in 2020 were held via teleconferencing.

ETC RESEARCH ACTIVITIES

WORKING TOGETHER TOWARDS A SUSTAINABLE FUTURE

The importance of planning, developing, and monitoring tourism's sustainable performance has increased tremendously over the past years. And even though the concept of "measuring the sustainability of tourism" is not new, there are hardly any sources of information that allow for easy and fast data comparison between destinations.

Following an extensive exercise of exploring and assessing tourism indicators used across Europe, ETC has launched the first wave of its project on "Measuring Sustainable

Tourism Indicators (MSTI) in Member Countries". ETC's ambition is to build a reliable database on STIs, which shall be used by destinations for quick consultations, benchmarking purposes and exchange of good practices over time.

Twenty-five countries participated in the project's first wave, providing information on indicators at national, city, coastal, and rural regions.

Results are available for members only.

PRINCIPLES

1. Relevance
2. Data availability
3. Comparability
4. Timelines
5. Be ambitious
6. Make use of existing data
7. Learn from others' experience

INDICATORS

1. Tourist satisfaction
2. Locals satisfaction
3. Number of beds per 100 residents
4. Tourism intensity
5. Tourism density
6. Bednights
7. Seasonality rate
8. Average spend of tourists
9. Average length of stay of tourists
10. Employment/ total economy
11. Carbon footprint
12. Establishments with certifications

DATA LEVELS

1. National level
2. Urban regions
3. Coastal regions
4. Other rural regions

EUROPEAN
TRAVEL
COMMISSION

LONG-HAUL TRAVEL BAROMETERS REFLECTED THE IMPACT OF THE PANDEMIC ON OVERSEAS TRAVEL INTENTION

In 2020, ETC published three Long-Haul Travel Barometers that provided the European tourism sector with early indications of the travel interest in important overseas markets. The barometers shed light on potential travellers' preferences, motivations and barriers related to holidays in Europe.

Despite the strong optimism for overseas travel at the beginning of 2020, the COVID-19 pandemic grounded many airlines, shut down hotels, restaurants, and destinations worldwide. These events inevitably resulted in a weak travel confidence, which lasted for the remaining part of the year.

The uncertainty about the duration of travel bans continued hampering people's travel plans. The shrinking global economy, rising unemployment rates and concerns about personal safety were also factors that took long-haul travel out of many people's priority lists. Not being able to enjoy many of Europe's experiences due to COVID-19 restrictions was also among the frequently mentioned concerns among survey respondents.

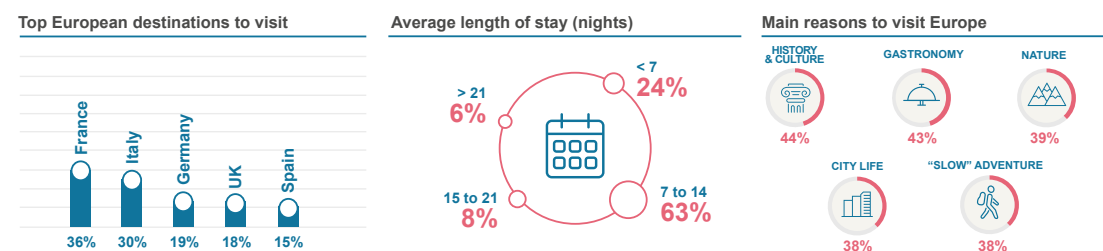
An expected shift in what matters for tourists when making decisions about places to visit in a post-pandemic world was also apparent. Destinations demonstrating a good COVID-19 management (e.g., low number of cases, effective health standards and implemented pandemic measures) was the preferred option for survey respondents. Visiting places that are less crowded and more affordable had also overtaken world-famous attractions, which was traditionally the main driver of destination-choice.

The Long-Haul Travel Barometers were launched with the support of the European Tourism Association (ETOA), Eurail BV, the European Commission and TCI Research.

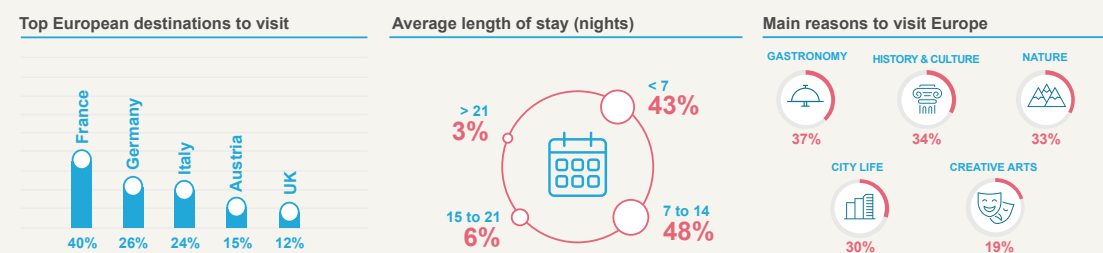
DESTINATION EUROPE

LONG-HAUL TRAVEL BAROMETER FEBRUARY 2020

EUROPE'S HISTORY, CULTURE AND GASTRONOMY ATTRACT THE ATTENTION OF MANY AMERICANS



EUROPE'S CULINARY SCENE LURES AN INCREASING NUMBER OF JAPANESE TOURISTS



The sentiment index for travelling to Europe is positive in the US, Russia and Japan (103p for all three). However, only 29% of the respondents in Russia and the US, and 18% of those in Japan plan to visit the region in the first four months of the year, potentially reflecting a gloomy appraisal of the financial prospects in the short-term.

COMMUNICATION OF GASTRONOMY ON ETC MEMBERS' OFFICIAL WEBSITES

The rise in interest in food tourism attractions at the destination coincides with the emergence of new ways of communicating and sharing experiences. The use of social media, websites and apps adds to the tourist's experience, allowing them to contribute to the development of the experience and to communicate it informally to their peers. Destinations are no longer the only ones that communicate their tourism offer, and now, they have to consider the existence and importance that informal communication channels have in addition to the official ones.

In cooperation with Università della Svizzera italiana, the study [Communication of Gastronomy on ETC Members' Official Websites](#) examined how different countries communicate online the presence of food tourism attractions at the destination to prospective tourists.



EUROPE HOLDS 17% OF THE SHARE OF INDIAN OUTBOUND TRAVEL

In recent years, a large and growing population coupled with a strong economy has fuelled the growth of the Indian outbound travel market. International departures from India have increased from 16.6 million in 2013 to 26.3 million in 2018, reflecting a five-year CAGR of 9.6%¹. Indian tourists are amongst the highest spenders abroad. Outbound tourism expenditure from India totalled US\$21.3 billion in 2018, registering a growth of 22% over the previous year².

With the support of the European Union, ETC published the [Research Snapshot on the Indian Outbound Travel Market](#). This research snapshot provides readers with an overview of the Indian outbound travel market and serves as a guide for European tourism stakeholders looking for information and opportunities to do business with tourism operators in India. The paper also includes recommendations on how to target the Indian travel trade and tourists.



¹ Ministry of Tourism, Government of India – India Tourism Statistics at a Glance – 2019

² UN World Tourism Organization

GENERATION Z RECOGNISES ITS RESPONSIBILITY IN SHAPING THE FUTURE OF TRAVEL IN EUROPE

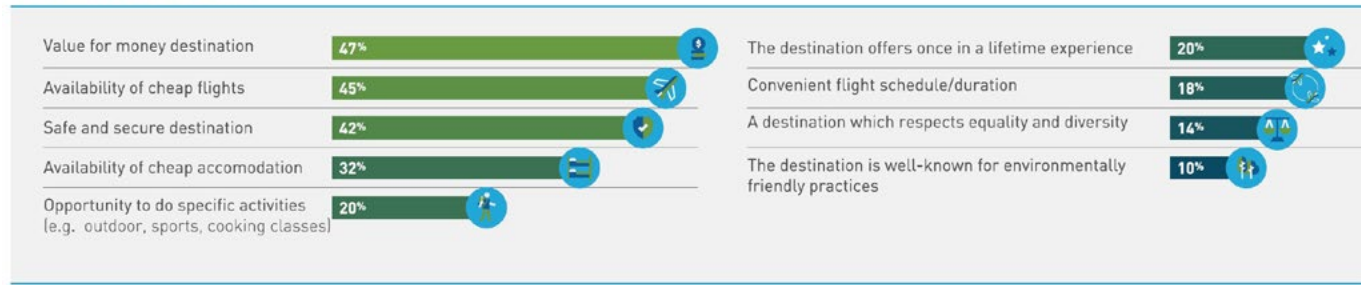
VALUE FOR MONEY (47%), AVAILABILITY OF CHEAP FLIGHTS (45%) AND SAFETY AND SECURITY (42%) ARE THE TOP REASONS FOR GENERATION Z TO CHOOSE A TRAVEL DESTINATION

Members of Generation Z are often described as highly adaptable, smart and tolerant. Their different lifestyles, motivations and habits make them a segment difficult to generalise, but also a segment that will pave the way for innovation and responsible tourism. As the world’s youngest population grows, becomes more affluent and begins to travel, it is likely to cause major changes in consumer travel demand. Understanding Gen Z travellers and their concerns and motivations is fundamental to evaluating how tourism demand could evolve in the years to come, and how it could impact tourism in Europe and worldwide.

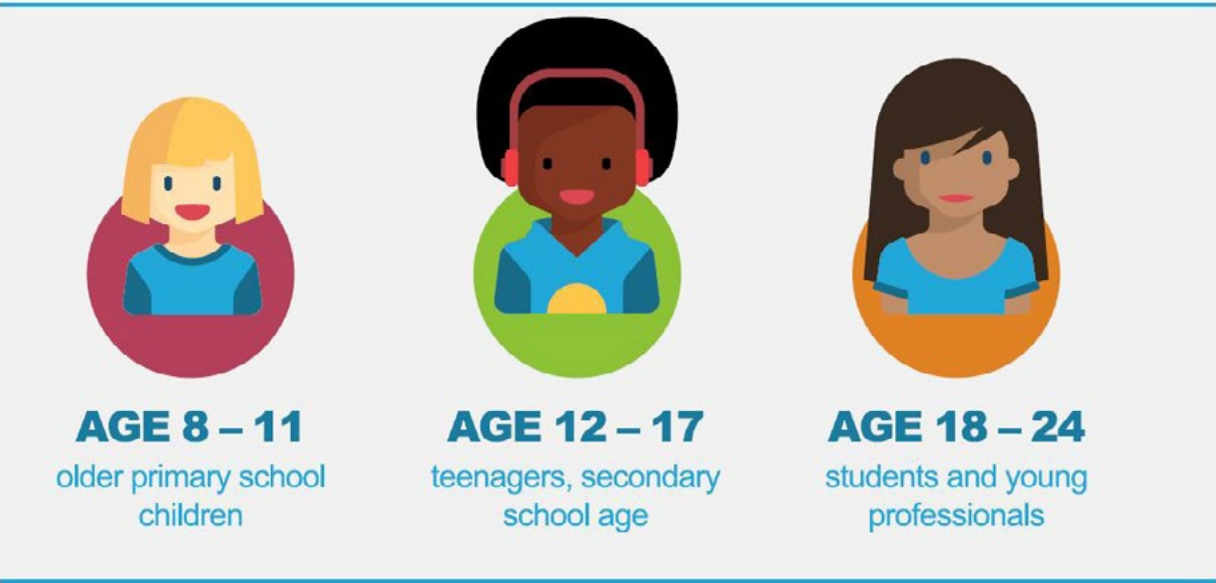
To grasp this opportunity, ETC launched the [Study on Generation Z Travellers](#), which investigates the travel preferences and behaviours of this demographic segment in four markets – China, Germany, the UK and the US. The study delves into their motivations, aspirations and views, and translates those into future-oriented travel market intelligence. In addition, the report offers a list of 12 trends, which illustrate what Europe’s tourism sector could expect to see in terms of both supply and demand, in the coming 10-15 years.



WHEN CHOOSING A EUROPEAN DESTINATION, GEN ZERS LOOK FOR:



GEN ZERS CAN BE DIVIDED INTO THREE BROAD CONSUMER GROUPS:



SHORT-TERM RENTALS PARTNERSHIP WITH TRANSPARENT

In cooperation with [Transparent](#), ETC developed a benchmarking project for short-term rentals insights in Europe. The Short-Term Rentals Dashboard provides key metrics for both supply and demand in each ETC member country and monitors the short-term rentals listings from the four main online travel agents in the short-term rentals sector: Airbnb; Booking.com; HomeAway and TripAdvisor.

ETC also partnered with Transparent to provide ETC members with a free course to build their own business intelligence dashboards. This course is offered through Google Data Studio, a powerful free tool developed and maintained by Google that will allow users to produce complete custom dashboards.



SOUTH EAST ASIA OUTBOUND TRAVEL MARKET ANIMATED VIDEO

ETC released an [animated video](#) summarising the key findings from the [Study on the South-East Asian Outbound Travel Market](#), which investigated the potential of four key outbound markets in the South-East Asian region: Indonesia, Thailand, Malaysia and Singapore. The study aims to provide insights into the South-East Asian travel market and identify long-term attitudinal and behavioural emerging trends with respect to travel to Europe.

MARKETING

TRAVEL TRADE

FAM TRIPS

ETC in cooperation with several international partners organised a short series of familiarization trips for niche tour operators, travel wholesalers and other members of the travel trade from long-haul markets for the purpose of educating them about thematic pan-European products and experiences. The fam trips were co-funded by the European Union.

ETC invited North American buyers to trace the footsteps of the heroes that liberated Europe. Participants explored historical sites, museums and iconic monuments in some of the most popular European cultural destinations. Two fam trips took place in February 2020, which included visits to sites in Italy and Czech Republic and in Belgium, Luxembourg and the Netherlands.



Participants of the history fam trip in Monte Cassino, Italy

A creative cities fam trip for North American buyers, with the support of ETOA, took place between 26 February and 4 March 2020. The itinerary included visits to sites and creative experiences in Belgium, France and Luxembourg. The fam trip was organised in conjunction with the ETOA Nordic Marketplace in Copenhagen.



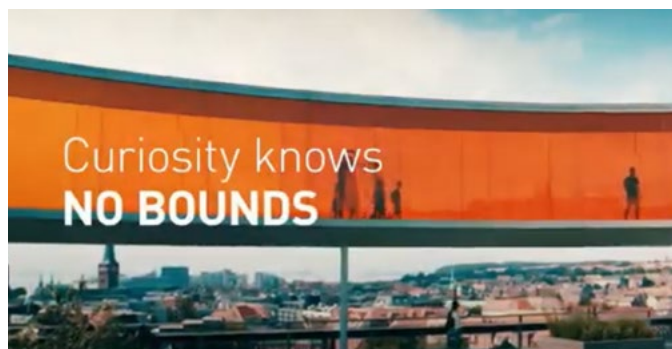
Participants of the Creative Cities fam trip in Wallonia, Belgium

Additional fam trips were suspended in light of the COVID-19 pandemic.

TRADE ACTIVITIES IN NORTH AMERICA

ETC participated in the [Virtual Travel and Leisure Show](#) in September in Canada. Destinations in the European virtual booth interacted with 500 Canadian travel agents to present a unified approach about the current situation of the industry in Europe as well as to understand agent's concerns. On the same basis, ETC also participated in the [ACTA 2020 Travel Industry Summit](#) in November.

ETC's USA Chapter participated in [USTOA's Virtual Annual Conference and Marketplace](#) in December 2020. ETC hosted a dedicated market intelligence briefing entitled 'Restarting Travel to Europe' which was built within the conference programme. More than 150 operators and advisors followed the session which made it one of the most attended briefings of the event. ETC also sponsored a tour operator's panel discussion which had a specific focus on European destinations. ETC's new [reassurance video](#) was presented during the event.



EUROPE VIRTUAL ROADSHOW IN BRAZIL

ETC organised a [Virtual Roadshow](#) in Brazil in November 2020 to foster tourism recovery by connecting European destinations with the Brazilian travel trade and explaining how to travel safely in Europe once restrictions are lifted.

ETC used a state-of-the-art 3D interactive platform to host this virtual roadshow. The platform provided a fully immersive social virtual reality experience which allowed European partners and visitors to engage and interact via avatars.

This virtual event hosted a total of 19 stands in 5 interactive virtual spaces where European destinations were able to meet with top members of the Brazilian travel trade.



ITB CHINA MEETUP EVENTS

ETC co-hosted the ITB China Industry MeetUp event series which took place between September and November 2020. The events were designed to provide global travel suppliers unique opportunities to reconnect with Chinese buyers, and get updated on latest trend insights, relating to the 'new normal', as well as meet face-to-face with members of the exclusive ITB China buyers circle. The MeetUp Events visited Shenzhen, Changsha, Beijing, Shenyang, Chengdu and Shanghai.



Members of the ETC China Chapter at the ITB China Meetup Event in Shanghai



The ITB China Meetup Events offered an opportunity to reconnect with the Chinese travel trade



Conference sessions at the ITB China Meetup Event

As part of ETC's involvement in the ITB China Industry Meetup, participating ETC Members gained discounts on their participation fees as well as free access to panel discussions and speaking slots. The events saw the presence of over 1,000 Chinese travel trade professionals and interventions by 9 ETC Members.

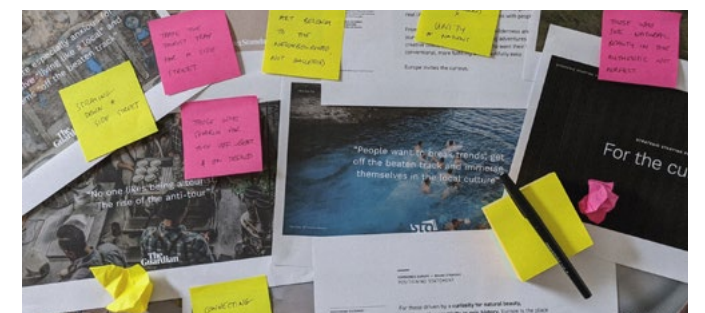
CONSUMER MARKETING

A NEW BRAND ARCHITECTURE AND NARRATIVE



ETC's Marketing Group developed the new [Experience Europe Brand Strategy](#). The brand architecture defines the brand promise, values, key messages and tone of voice of the Europe brand and its respective key passion points (nature and outdoors, creative cities and history and ancestry). The strategy is meant to serve as a guide for future content development for promotional activities and to guarantee coherence and objectivity in their narratives and messages.

ETC curated a selection of twenty-five so-called Extraordinary Experiences of Europe (EEEs). This collection of experiences was researched and measured against a set of criteria which considered their alignment with the values of the Experience Europe brand strategy and their economic, environmental and social sustainability. This set of experiences is meant to serve as a paradigm of what ETC's priority niche consumer segments from around the world can do in Europe, capture their attention and entice them to visit. The collection of EEEs will inform content marketing activities and is also expected to encourage future product development.



MARKETING ACTIVITIES

EUROPE INVITES THE CURIOUS

ETC initiated the content development for the global communication and promotional campaign “[Europe invites the curious](#)”. This includes development of storylines and key messages, hero visuals, videos, landing page, social media posts, etc. Further preparations included the recruitment of micro-influencers to take part in content distribution as well as translation and localisation of creative assets. The campaign had a soft launch on social media in late 2020.



A social media workshop with hands-on marketers from ETC members took place prior to the campaign soft launch in December 2020. The workshop showcased critical exercises on social media, examples and case studies on how to amplify the campaign on ETC members' own channels as well as guidelines and tips to maximise visibility and impact of communication materials.

CO-BRANDING CAMPAIGNS

ETC carried out a series of co-branding promotional campaigns in cooperation with multiple public and private partners to leverage resources for the joint promotion of Destination Europe in third markets. ETC initiated two co-branding campaigns with the NTOs of Serbia and Montenegro and several Irish DMOs under the Nature and Outdoors passion point with the aim to create awareness of slow adventure experiences in Europe among Free Independent Travellers (FITs) in China, Canada and USA. The campaigns kicked-off in late 2020 and will continue through the first quarter of 2021. At the time of reporting, these campaigns had received 8.7 million impressions among North American FITs, and 135 million impressions among Chinese FITs.

ETC also launched a co-branding promotional campaign together with the NTOs of Germany and Flanders under the Creative Cities passion point. This campaign aimed at promoting Europe, its culture, art and vibrant lifestyle to Chinese and North American travellers. The campaign launched in December 2020 and will continue through the first quarter of 2021. It reached 2.8 million impressions in its first month.

EUROPEAN STORIES NETWORK

ETC in partnership with its associate member CrowdRiff kicked off the development of the [European Stories Network](#).

Stories are a mobile-focused format (Accelerated Mobile Pages or AMP) for delivering content in a visually rich, fast-loading, full-screen tap-through experience. These travel stories allow for a mobile-first, immersive experience that delivers a visual narrative composed of photos, videos and text.

The European Story Network provides a unique ecosystem of compelling, mobile-first content created by ETC, its member NTOs and local partners that showcases extraordinary travel experiences across a decentralised audience reaching travellers all over the world. The current network includes more than 10 NTOs.



Stories were integrated in the [VisitEurope.com](#) portal and will be further distributed as part of the upcoming global campaign – Europe invites the Curious.



2020 also saw the launch of a multi-thematic [pan-European promotional campaign](#) targeted towards Chinese FITs. The campaign, in cooperation with 35 DMOs, aimed at raising awareness of extraordinary travel experiences in European destinations under the Nature & Outdoors and Creative Cities passion points. At the time of reporting, the campaign had accumulated over 165 million page views on Weibo, WeChat and DouYin (TikTok). The campaign will continue well into 2021.



MARKETING GROUP

MARKETING GROUP AND OVERSEAS CHAPTERS

CHAIR: Elke Dens, Belgium-Flanders

CO-ORDINATOR: Miguel Gallego, ETC Executive Unit

ANNUAL MEETING IN MALTA

The members of the ETC Marketing Group (MKG) came together during the Annual Meeting in Sliema, hosted by the Malta Tourism Authority, to discuss the implementation of the promotional activities within the Horizon 2022 strategy.



ETC's 5th Annual Meeting took place in Sliema, Malta

Highlights of the programme included a workshop about the new Experience Europe brand architecture, presentations by ETC associate members CrowdRiff and Eurail, as well as brainstorming sessions on ETC's future promotional activities and exchange of best practices which featured presentations from various ETC members. The Annual Meeting concluded with a technical visit showcasing experiences under the history passion point, to give delegates a first-hand experience of the Horizon 2022 strategy.



ETC's Marketing Group during the Experience Europe brand architecture workshop

NEW CHAIRMANSHIPS OF OVERSEAS CHAPTERS

ETC welcomed a group of new faces at the helm of its overseas chapters. Petr Lutter (CzechTourism) was appointed as Chairperson in Brazil, joining Vice-Chairperson Oscar Almendros (Turespaña). In China, Zuzanna Gutkowska (Polish Tourism Organisation) and Franka Gulin (Croatian National Tourist Board) took over as Chairperson and Vice-Chairperson respectively. With the new appointment in China, ETC bade farewell to Ludivine Destrée from Wallonia Tourism Belgium who represented the China Chapter for 3 years, leading ETC activities through the 2018 EU-China Tourism Year and representing the organisation during a challenging 2020.



From left to right: Zuzanna Gutkowska, Ludivine Destrée and Franka Gulin

Pascal Prinz (Switzerland Tourism) took over the Canada Chapter Chairmanship from Dana Welch (Tourism Ireland). ETC's USA Chapter's Chairperson Alison Metcalfe (Tourism Ireland) and Vice-Chairperson Marco Frank (VisitFlanders) were re-appointed for an additional term of 2 years.

The Overseas Chapters held regular meetings to share insights on the impact of the pandemic in their marketing plans and the response of their individual destinations and governments, while assisting ETC in various trade activities meant to restore confidence.

PARTNERSHIPS

COOPERATION WITH THE CULTURAL HERITAGE SECTOR

For the third year in a row, ETC has once again partnered up with the European Cultural Tourism Network (ECTN), Europa Nostra and the Network of European Regions for Competitive and Sustainable Tourism (NECSTouR) to contribute to the legacy of the European Year of Cultural Heritage 2018 and to encourage the development of sustainable tourism destinations around Europe.

The theme of this edition of the 'Destination of Sustainable Cultural Tourism' Awards focused on 'Special interest tourism development and promotion based on Cultural Heritage'. The Awards contest was open to tourist destinations across Europe, to showcase their results and initiatives in sustainable cultural tourism under five selected categories, including transnational thematic tourism products, digitalisation and innovation.

The winners and runners-up were selected by the Jury (composed of representatives of ECTN, ETC - Vice-President Kristjan Staničič and Executive Director Eduardo Santander, Europa Nostra, NECSTouR, the Directorate General for Culture, European Commission, the Phoenicians' Cultural Route and Iter Vitis Cultural Route), out of over 40 applications received from 16 countries.

The winners were awarded for their achievements that have produced significant results related to enhancing visitor experience while respecting traditions and involving local communities. The winners in the category proposed by ETC for this edition of the Awards - *Transnational Thematic Tourism Products, including Cultural Routes* - are Historic Cafés in the Iberian Peninsula by Portuguese Historic Cafés Association, Portugal and Spain (1st prize) and Vilar Formoso by Câmara Municipal de Almeida, Portugal (2nd prize).



The full list of winners can be consulted at:



ETC - CIFTT Award

In cooperation with the [International Committee of Tourism Film Festivals \(CIFTT\)](#), the most prestigious awards and recognition initiative in travel video marketing industry, ETC launched a [joint award scheme](#) for its members. The scheme awards promotional tourism videos from ETC full and associate members, recognising the importance of multimedia in tourist marketing destinations. 18 submissions from 12 ETC full members were received across two categories: social responsibility and value of tourism in light of the COVID-19 pandemic, and general national promotional videos.

The winners will receive fully sponsored entry to the [Grand Prix CIFTT Circuit 2021](#), where the selected videos will compete in travel video competitions in 15 countries across the world. The winners are as follows:

1st place



[Time to #stayhome. Turn to nature and dream.](#) - Slovenia (Social responsibility and value of tourism/COVID-19 category)

2nd place



[Discover the colors you never knew existed](#) - Lithuania (Country promotion category)

3rd place



[Much more than "just" Denmark](#) - Denmark (Social responsibility and value of tourism/COVID-19 category)

ADVOCACY

ETC AND EURAIL PRESENT A SHARED VISION FOR SUSTAINABLE GROWTH

ETC joined forces with Eurail to present a [White Paper on Rail Transport for International Tourism in Europe](#) defining sustainable growth models that accelerate the transformation to a sustainable, digital and innovative tourism sector in the aftermath of the COVID-19 crisis.

As one of the most labour-intensive sectors of the economy, support to establish a fast-track recovery for the European tourism sector is needed to prevent the loss of millions of jobs. As the importance of climate challenges has not waned, the European tourism sector must also take a global lead and set new standards that secure future growth along sustainable patterns.

This white paper presents possible growth models where rail transport becomes pivotal for international travel in Europe, reducing the environmental footprint of tourism and preventing a return to situations of overcrowded destinations. For this vision to become reality, ETC and Eurail call on European Institutions to take action in the following areas:



1

Strong political and financial support to promote the benefits of rail travel for leisure purposes among travellers from Europe and overseas, through dedicated educational and promotional campaigns.

2

Promote and support sector-wide initiatives lead by railways and national tourism boards to engage all relevant actors across the industry and secure support for joint action.

3

Commitment to invest and support railways to enable carriers provide quality transport services that meet the specific needs of leisure travellers at an adequate price that leaves no one behind.

4

Promote smart mobility models with railways as integrators for seamless, sustainable, affordable and accessible mobility for residents and visitors alike.



EUROPEAN TOURISM MANIFESTO CELEBRATES ITS 5TH ANNIVERSARY

2020 marked the 5th anniversary of the [European Tourism Manifesto](#), an alliance bringing together more than 60 European public and private organisations, covering the whole tourism value chain and beyond. The celebration took place on 9th December in an online event organized by ETC which was attended by the supporting organisations, a representative of the Portuguese Presidency (Mr Luís Campos, Chair of Council Working Party Tourism) and two MEPs (Mrs. Cláudia Monteiro De Aguiar and Mr István Ujhelyi), long-time supporters of the alliance's activities.

At the event, the stakeholders and the policy-makers applauded the excellent work done by ETC during the past 5 years in driving forward numerous joint initiatives on issues impacting the sector ranging from a budget and EU strategy for tourism to visas, harmonised travel restrictions and national recovery & resilience plans. The supporting organisations also declared their commitment to intensify these joint efforts in times of crisis.

Holding Secretariat and Chairmanship, ETC looks forward to continuing crucial work with the alliance in finding solutions for recovery from the current crisis, but also in shaping the tourism of tomorrow.

More information about the activities of the group and the policy priorities of the travel and tourism sector can be found at:



CORPORATE COMMUNICATIONS

ESTABLISHING ETC AS A PROMINENT ADVOCATE FOR TRAVEL & TOURISM IN FACE OF THE COVID-19 CRISIS

Throughout 2020 ETC actively engaged in media communications to stress the devastating impact of the COVID-19 crisis on European tourism, highlight the importance of tourism for the economic and social development in Europe, and urge more support for the sector. The COVID-19 pandemic and increased focus of media, policymakers, and the wider public on tourism helped further establishing ETC's reputation as one of the key European tourism stakeholders and a permanent advocate of the travel and tourism sector.

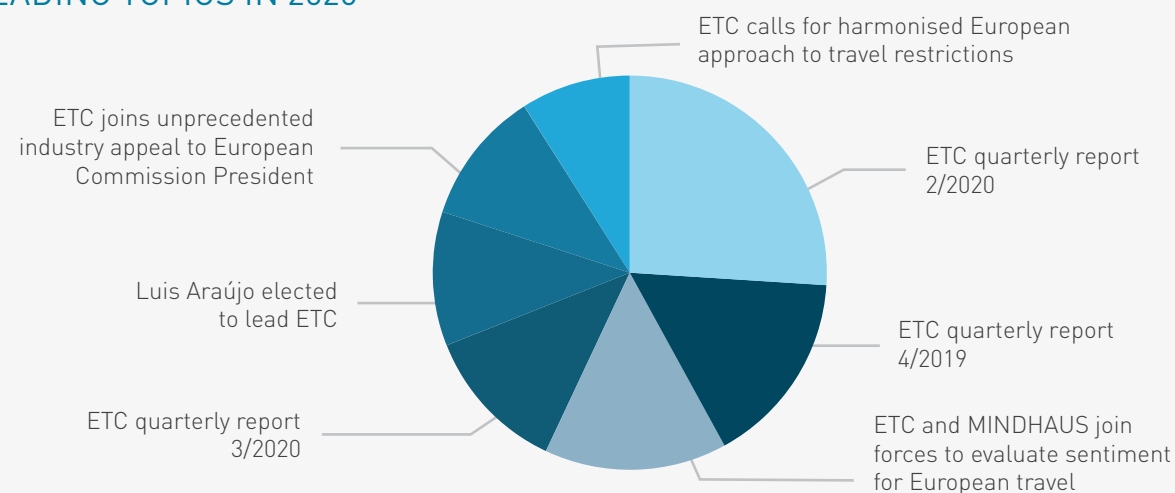
In 2020, ETC published 23 press releases and 13 website articles to support its policy messages and promote its latest research and marketing campaigns. ETC's work

received extensive media coverage worldwide, generating over 1170 press mentions in various mainstream and trade outlets.

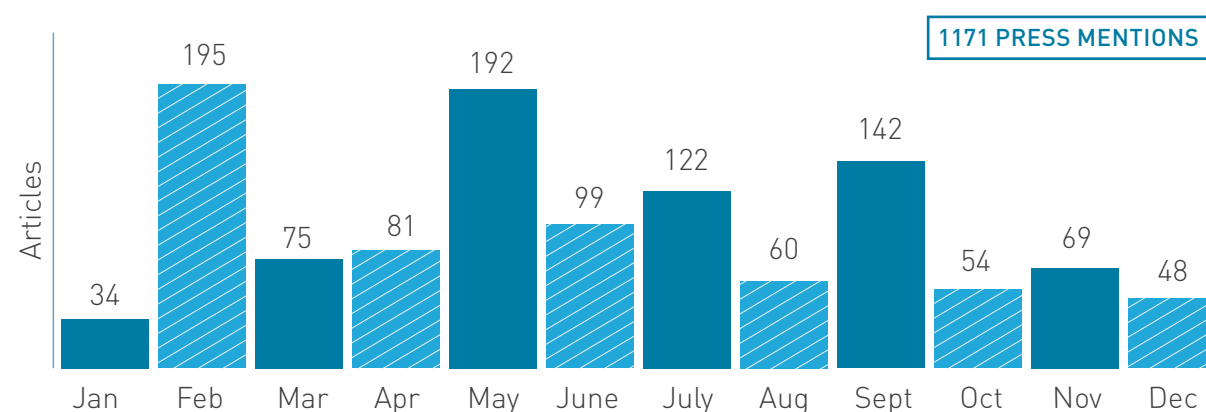
Due to COVID-19, a large proportion of the coverage was centred on the impact of the crisis on the tourism sector, with an outlook on the months ahead. The second quarterly report "European Tourism: Trends & Prospects" was the press release that got the most coverage in 2020, with a total of 67 publications. The fourth quarterly report for 2019 was the second most covered in 2020, with a total of 41 publications. The "Monitoring Sentiment for Domestic and Intra-European Travel" surveys also gained extensive coverage in the media, with the project's announcement mentioned in 38 publications.

Travel restrictions were another topic high on the public agenda throughout the year. ETC's call in August for

LEADING TOPICS IN 2020



ETC MEDIA COVERAGE IN 2020



ETC Executive Director Eduardo Santander's interview with Euronews on the COVID-19 impact on tourism employment, May 2020

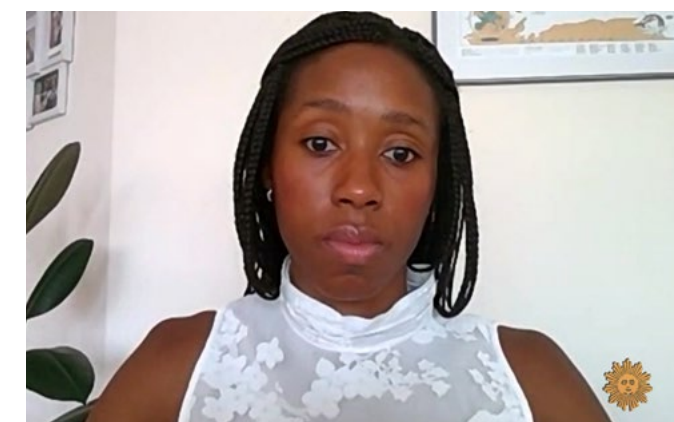
a harmonised European approach to travel measures supported by data from Sojern proving low tourism confidence across the continent gained much attention from the media, with a total of 23 publications. In September, ETC's involvement with other travel and tourism stakeholders also saw extensive coverage in European media (with a total of 27 articles) as a group of sector representatives called for the European Commission President to end quarantines and develop a common EU Testing Protocol.

ETC's proactive engagement in media communications resulted in growing numbers of press requests for comments and interviews as the year progressed. In 2020 ETC received over 100 media requests. Interviews, comments and statements from ETC's representatives were featured in a number of top tier international media, including [CNN](#), [Euronews](#), [BBC World News](#), [Bloomberg](#), [Financial Times](#), [The Washington Post](#), [The New York Times](#), [Euractiv](#), [NBC](#), [CNBC](#), [the Wall Street Journal](#), [CGTN](#), [China Daily](#), [TRT World](#) and other major press outlets.



ETC Head of Public Affairs Teodora Marinska commenting on European Commission's proposal on travel restart on TRT News, May 2020

It comes as no surprise that the vast majority of requests received related to the impact of COVID-19 on the travel and tourism sector, the various travel restrictions imposed in Europe and the process of restarting tourism. The media requests coming from a variety of major mainstream outlets demonstrates ETC's reputation as thought leaders and authority in the field of tourism, particularly during times of crisis.



ETC Head of Research Jennifer Iduh discussing 2020 summer prospects in Europe on CBS News, July 2020



ETC Executive Director Eduardo Santander's comments on US travel to Europe in the Washington Post, September 2020

MEMBERSHIP

LUÍS ARAÚJO ELECTED TO LEAD ETC TOWARDS SUSTAINABLE TOURISM RECOVERY IN EUROPE

Luís Araújo from Turismo de Portugal has been elected as ETC's President for a three-year term by the 99th General Meeting on 8th September 2020.

Luís Araújo is a long-standing member of the tourism sector with over 20 years of experience. Heading the Portuguese National Tourism Authority since February 2016, he leads a team of 650 people and 350 external trainers, and coordinates 20 tourism delegations covering 26 foreign markets for Portugal. Previously Mr Araújo was a Board Member at Group Pestana (the largest hotel group in Portugal with over 100 hotels in 15 countries) responsible for operations in Latin America while also leading the sustainability department of the group. He also served as Head of the Cabinet of the Portuguese Secretary of State for Tourism between 2005 and 2007.

Taking over the mandate during these unprecedented times, Luís Araújo will lead European destinations' joint efforts to rebuild the tourism sector in Europe in the aftermath of the COVID-19 crisis. The newly elected President aims to position ETC as the top influential voice in the sector's transformation towards responsible, sustainable, digital and resilient tourism of tomorrow.



I am extremely proud to be able to lead the European Travel Commission on behalf of Turismo de Portugal namely in a period when European tourism faces one of its biggest challenges if not the biggest. One of the main goals is to ensure that tourism has a stronger voice in Europe and the EU, through better coordination among countries, in view of a quick and sustainable recovery of the tourism sector.

Luís Araújo, ETC President

Luís Araújo takes the Presidency over from Peter De Wilde, CEO of VisitFlanders, who held the position for six years and lead ETC through reform, enlarging a portfolio of activities and attracting numerous associate members from the private sector.



KRISTJAN STANIČIĆ TO STEER ETC'S SUSTAINABILITY AGENDA

During the 99th ETC General Meeting, Mr Kristjan Staničić, General Director of the Croatian National Tourist Board (CNTB), was also elected as ETC Vice-President for Sustainability. Mr Staničić has led CNTB and its team of 130 people since 2017, combining his extensive experience in destination branding and marketing, tourism management and sustainable development. He will work alongside ETC's new President, in crisis management and in ETC's efforts to further foster the sustainable tourism growth of Destination Europe.

Current ETC Vice-President Ms Magda Antonioli from ENIT was re-elected for another mandate at the General Meeting. She will continue her work in supporting the President and coordinating ETC's actions on connectivity.

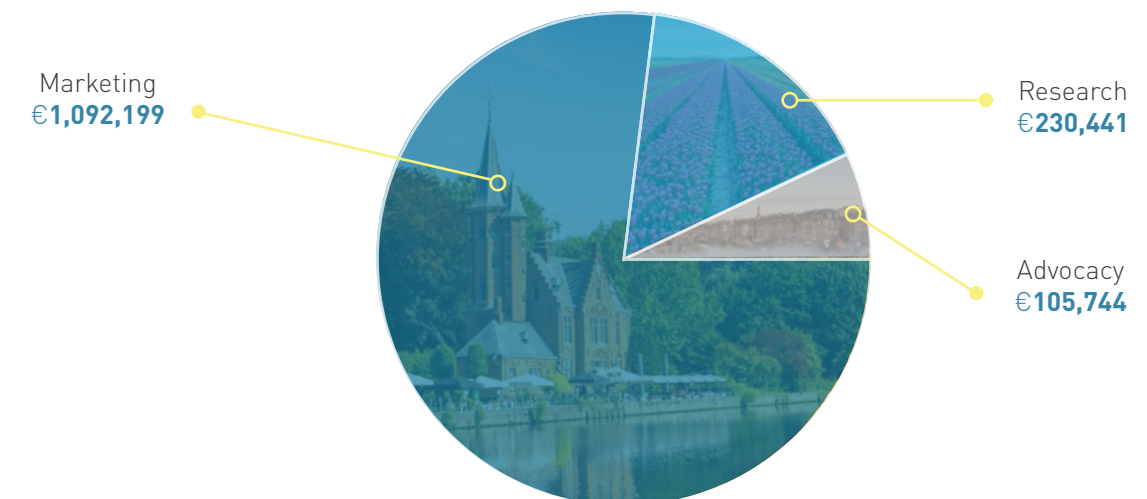
FUNDING

ETC 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 2020, ETC used a grant from the European Commission focused on promotion of 'Destination Europe' in line with ETC's new strategy "Horizon 2022" and the priorities of EU tourism policy. The grant was co-funded by partners in the framework of the Joint Promotion Platform.

Figures provided are pending final approval at the moment of publication.

EXPENSES OVERVIEW



INCOME OVERVIEW



TOTAL INCOME
€2, 712, 907

WHO WAS WHO AT ETC IN 2020¹

PRESIDENT



Luis Araújo (Portugal)

VICE-PRESIDENTS



Magda Antonioli (Italy)



Kristjan Staničić (Croatia)

BOARD OF DIRECTORS



Peter De Wilde (Belgium)



Petra Hedorfer (Germany)



Eszter Alföldi (Hungary)



Inese Sirava (Latvia)



Guy Antognelli (Monaco)



Željka Radak-Kukavičić (Montenegro)



Bente Bratland Holm (Norway)



Radúz Dula (Slovakia)

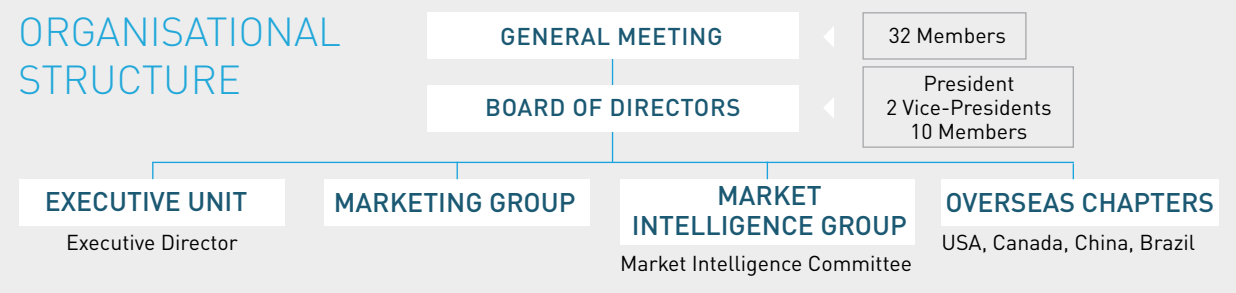


Miguel Sanz (Spain)



Martin Nydegger (Switzerland)

ORGANISATIONAL STRUCTURE



¹ Accurate as of end of 2020

FULL MEMBERS

<p>Belgium (Flanders)</p> <p>Visit Flanders</p>	<p>Belgium (Wallonia)</p> <p>Wallonie Belgique Tourisme (WBT)</p>	<p>Bulgaria</p> <p>Bulgarian Ministry of Tourism</p>	<p>Croatia</p> <p>Croatian National Tourist Board (CNTB)</p>	<p>Cyprus</p> <p>Republic of Cyprus, Deputy Ministry of Tourism</p>
<p>Czech Republic</p> <p>CzechTourism</p>	<p>Denmark</p> <p>VisitDenmark</p>	<p>Estonia</p> <p>Estonian Tourist Board - Enterprise Estonia</p>	<p>Finland</p> <p>Visit Finland - Finpro Ry</p>	<p>Germany</p> <p>German National Tourist Board (GNTB)</p>
<p>Greece</p> <p>Greek National Tourism Organisation (GNTO)</p>	<p>Hungary</p> <p>Hungarian Tourism Agency</p>	<p>Iceland</p> <p>Icelandic Tourist Board</p>	<p>Ireland</p> <p>Tourism Ireland</p>	<p>Ireland</p> <p>Fáilte Ireland</p>
<p>Italy</p> <p>Italian Government Tourism Board</p>	<p>Latvia</p> <p>Investment and Development Agency of Latvia (LIAA)</p>	<p>Lithuania</p> <p>Ministry of the Economy and Innovation of the Republic of Lithuania, Tourism Policy Division</p>	<p>Luxembourg</p> <p>Luxembourg for Tourism (LFT)</p>	<p>Malta</p> <p>Malta Tourism Authority (MTA)</p>
<p>Monaco</p> <p>Monaco Government Tourist and Convention Office</p>	<p>Montenegro</p> <p>National Tourism Organisation of Montenegro</p>	<p>The Netherlands</p> <p>NBTC Holland Marketing</p>	<p>Norway</p> <p>Innovation Norway</p>	<p>Poland</p> <p>Polish Tourism Organisation (PTO)</p>
<p>Portugal</p> <p>Turismo de Portugal</p>	<p>Romania</p> <p>Romanian Ministry of Tourism</p>	<p>San Marino</p> <p>State Office for Tourism</p>	<p>Serbia</p> <p>National Tourism Organization of Serbia (NTOS)</p>	<p>Slovakia</p> <p>Ministry of Transport and Construction of the Slovak Republic</p>
	<p>Slovenia</p> <p>Slovenian Tourist Board</p>	<p>Spain</p> <p>Turespaña - Instituto de Turismo</p>	<p>Switzerland</p> <p>Switzerland Tourism</p>	

ASSOCIATE MEMBERS



