Dear friends and partners of ETC,

2016 was another year of accomplishments and success for one of Europe’s oldest tourism organisations. Through increased marketing efforts in long-haul markets, a well-defined research programme and a powerful advocacy agenda, ETC strengthened its position as a major player in the tourism field, both on a European and global level, thus increasing the visibility and importance of its members.

In the past year, ETC was again very active in bringing up the topic of tourism on the EU agenda as well as emphasising its role as a driver of sustainable economic and social growth. Despite the fragmentation of Europe’s tourism industry, ETC was successful in bringing together a large number of public and private stakeholders under the European Tourism Manifesto for Growth & Jobs initiative, to stand united in front of the EU tourism policymakers.

With the support and guidance of the Vice-Presidents, the organisation moved forward its advocacy agenda on visa facilitation and sustainability. A study commissioned by ETC on the possible outcomes of visa facilitation for Europe revealed that greater liberalisation delivers greater economic return.

ETC closely monitored the impact of tragic events, geopolitical turmoil and economic woes on international tourist arrivals to Europe. Encouragingly, in 2016, European tourism demand continued to grow and proved resilient to safety and security challenges and political uncertainties. Overall growth, however, has slowed from the previous year (+2%) affected by those destinations required to rebuild market confidence following unpredictable events. It is therefore of paramount importance that the European tourism community works together to preserve Europe’s image as a tourism destination, capitalising on the potential pool of destinations and experiences to be discovered.

Partnerships are crucial for ETC in its mission to raise awareness and understanding among national European authorities and the general public of the importance of tourism and the need to ensure its development. In 2016, ETC expanded its network of strategic partners, working together with key industry representatives such as the International Gay and Lesbian Travel Association (IGLTA), Global Tourism Economy Research Centre (GTERC) and European Destinations of Excellence (EDEN) who share our common goal.

Our associate membership programme generated high interest among key players in the marketplace. We are delighted to welcome four new private companies joining ETC: Eurail Group GIE, STA Travel, Value Retail and Welcome Chinese.

ETC is seen as a reliable partner by the European Commission, which awarded the organisation a new grant in 2016. Main achievements include a newly-developed visual identity for Destination Europe to be used by public institutions and stakeholders, inspiring pieces of pan-European content on the VisitEurope.com portal, as well as new features of the ETC Executive Dashboard.

I would like to thank ETC members for believing in and supporting my vision of building the strongest corporate tourism brand in Europe. I am confident that the Executive Unit, under the leadership of its Executive Director, Eduardo Santander, will continue to ensure efficient and effective operations and turn this vision into reality.

With the growing commitment and engagement of its member NTOs, as well as the excellent work of the energetic Executive Unit and staff, ETC is moving on the right path to become the voice of tourism in Europe.

Peter De Wilde, ETC President
ETC EXECUTIVE UNIT

The Executive Unit has nine full-time employees in the following fields – Marketing and Communication, Digital, Public Affairs, Research, Finance and Administration.

Every year, ETC includes a number of trainees – students with a strong background in tourism who were given the unique opportunity to gain work experience along with a privileged insight into European tourism.

ETC EXECUTIVE UNIT

Eduardo Santander
Executive Director

Teodora Marinska
Head of Finance and Public Affairs

Miguel Gallego
Head of Marketing and Communication

Jennifer Iduh
Head of Research

Iulia Niculică
Operations and Administration Manager

Güneş Vural
Digital Manager

František Reismüller
Marketing Project Manager

Lyublena Dimova
Research Project Manager

Giulia Andrighetto
Office Manager

A former employee who was part of the team in 2016:

Stefanie Gallob
Head of Research

The following trainees joined our team during 2016:

Vladimira Sajbanova
EMTM - European Master in Tourism Management

Gizem Tüdeş
SKEMA Business School

The Executive Unit works on basic principles of integrity, respect, teamwork and adaptability to dynamic environments.

In 2016, the Executive Unit was proud to include staff members and trainees from nine different countries – Austria, Bulgaria, Germany, Italy, Luxembourg, Romania, Slovakia, Spain and Turkey.
2016 has confirmed Europe’s position as one of the most appealing tourist destinations in the world, recording an increase of 12 million international arrivals compared to the previous year. Independent of a stable European internal market, last year’s growth was remarkably driven by third markets. The reasons for this were mixed - cheap oil prices, favourable currency exchanges in established markets, as well as the rising of middle classes and infrastructure developments in emerging markets.

This highlights the importance of the work of the European Travel Commission in three key areas of focus: research, marketing and advocacy.

2016 was also a year marked by huge challenges for ETC. As an umbrella organisation of NTOs, our aim is to promote Europe as a tourist destination in third markets. Yearly results for Europe, although positive overall, were rather mixed, with a number of destinations affected by different challenges, particularly safety and security.

Demand continued to significantly drop in all European destinations affected by terrorism and other disruptions, until the end of 2016. However, these European destinations bounced back much faster than other destinations worldwide. The reason? Europe is still, de facto, the safest continent in the world and the most attractive one.

Other factors such as the refugee humanitarian crisis, Brexit and the rise of populism have created, to some extent, international concerns for the travel and tourism industry. The European tourism sector hopes and expects that calmer heads will prevail, as new foreign and migration policies would have an impact on the competitiveness of Europe as a tourist destination.

ETC sees these challenges as opportunities. The founding principle of our organisation almost 70 years ago was to promote tourism as a catalyst for peace, understanding and respect. Although time may have passed, ETC still stays true to its original mission.

The issues of freedom to travel, visa facilitation and Open Skies remain crucial for seamless tourism flows. The strength and opportunities for the European tourism and travel sector come with open borders and the desire of people to move between continents and within Europe.

The announcement of the EU-China Tourism Year 2018 has created momentum and huge opportunities to find a way to boost travel from China based on people-to-people dialogue and soft diplomacy. The Chinese economy will continue to generate strong demand for outbound travel, especially for Europe. We need to prepare our destinations and business tourism providers to cater for this growing demand.

Our President, Vice-Presidents, Board of Directors and members of our General Meeting deserve a special mention for their forward-looking guidance and for keeping the spirit of collaboration higher than ever.

Last but not least, I would like to wholeheartedly thank my team at the Executive Unit in Brussels for their ongoing dedication and extraordinary work, which made last year one of great success.

Now more than ever, together we’re stronger, in Europe and for Europe.

Yours sincerely,
Eduardo Santander
Europe is still one of the world’s most vibrant and appealing destinations for travellers from around the world. 2016 marked a year of sustained growth for the European tourism sector with impressive growth posted by most destinations amid a volatile economic and political environment, and safety and security concerns.

The region accounts for more than 50% of the tourism market share globally and welcomed 615 million international tourist arrivals in 2016, a modest but welcome 2% increase compared to the previous year.

The positive performance across the region was driven by the strong tourism demand from large intra-regional and overseas markets. However, the handsome growth recorded in several destinations was offset by weaker results in those affected by tragic events.

Since the UK voted to leave the European Union in the referendum held on 23rd June 2016, there has been considerable uncertainty about the long-term impact of ‘Brexit’ on the European tourism sector.

For the time being, a weaker sterling against the euro has made travel abroad more expensive for the British. However, travellers from this market continue to travel abroad with European destinations posting double-digit growth in arrivals from the UK.

Tourist flows from Russia continue to recover following a long period of weakness. In 2016, several European destinations rebounded from the falls experienced over the same period the previous year. Some improvement in the Russian outbound travel market is expected in the coming year as the rouble strengthens.

Across the Atlantic, US travellers continue to benefit from a stronger currency and competitive international air fares. In 2016, US visitors to Europe increased around 8% compared to 2015.

Eastwards, Chinese arrivals to Europe have been growing, with some 10.2 million arrivals registered in 2016, up 2% from 2015. Growth, however, has been more moderate showing a higher sensitivity to adverse events in comparison with other markets.

Although a small market at present, Indian outbound travel holds a promise for future expansion as people become more affluent. In 2016, 2.3 million arrivals were recorded in Europe from this market. Although current arrival numbers from India are low in absolute terms, India will become increasingly more important as a source market for European destinations in the coming years.

ETC’s outlook for European tourism in the coming year remains positive with growth in arrivals forecasted to be 3% among ETC members.

The key enablers to sustain Europe’s leading position as the #1 tourism destination worldwide lie in strong cooperation between destinations and stakeholders; diversification of the region’s guest mix; and an adequate targeting of potential travellers outside the dominant
intra-European markets, considering both emerging and mature markets. Only through increased commitment and cooperation from the European authorities will Europe remain competitive and succeed in fostering inbound travel.

THE EUROPEAN TOURISM SECTOR - IMPACT OF TOURISM ON EUROPEAN UNION ECONOMY IN 2016 (total contribution)

International Tourist Arrivals by European Subregion in 2016

Source: ETC Executive Dashboard, UN World Tourism Organization (UNWTO) and World Travel & Tourism Council.
The Market Intelligence Committee (MIC) comprises a group of volunteers from the research departments of eleven of ETC’s NTO members. The MIC meets four to five times a year and, in 2016, four meetings were held in Brussels, Madrid and Vienna.

MIG Annual Meeting

The 30th Annual Meeting of the ETC Market Intelligence Group took place in February in Prague, Czech Republic. The meeting gathered together the research directors of ETC member countries, as well as representatives of ETC’s research partners - the European Tourism Association (ETOA), the World Tourism Organization (UNWTO), the World Travel and Tourism Council (WTTC) and ETC’s associate members - Global Blue, Eurail Group, Amadeus and Expedia Media Solutions. The meeting gave ETC members a chance to take stock of the latest trends in research and tourism and provided a platform for the exchange of expertise and research findings.

PARTNERS

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

EVENTS & WEBINAR CALENDAR 2016

MIC Meetings – April, June, September and December 2016

MIG Meeting – February 2016

ETC & UNWTO Roundtable Exploring Health Tourism – June 2016

12th TourMIS Users’ Workshop – September 2016

ETC Webinar Executive Dashboard – November 2016
RESEARCH ACTIVITIES

LONG-HAUL TRAVEL BAROMETER
To best support the European travel and tourism sector, ETC, the European Tourism Association (ETOA) and the Eurail Group have jointly launched a new research initiative that monitors travel sentiment in key extra-European markets: the USA, Brazil, China, Japan and the Russian Federation.

The Long-Haul Travel Barometer captures people’s intention to travel abroad, their motivations and barriers to travel, as well as key characteristics of their trip. Results are based on 1,000 interviews conducted in each market every four months. A set of six infographics was published in 2016, three of them focussed on the potential traveller’s intention to visit Europe and another three on a special topic based on travel pattern comparisons. To download the infographics please visit www-etc-corporate.org

ETC REPORT ON EUROPEAN TOURISM COMPETITIVENESS
Well-known indices and indicator systems provide a continuous assessment of tourism competitiveness across the world’s different destinations by highlighting the significant advantages and disadvantages that define a successful tourist destination. While European destinations are ranked very favourably, it is essential that these destinations are aware of, and embrace, the realities of key shifts in the business environment to maintain their top positions and Europe’s leadership in the future.

For this reason, ETC has embarked on a project that investigates the competitiveness of the European tourism industry in light of the shifts resulting from a transforming business environment in the global marketplace. The aim of this strategic report is to identify those emerging shifts that have, and are expected to have, implications for the competitiveness of tourist destinations in both Europe and worldwide, and provide European destinations and their stakeholders with guidance and recommendations at a political level on how to adapt to, and extract advantages from, a transforming business environment.
ETC-UNWTO INTERNATIONAL SEMINAR ON CONSUMER TRENDS AND TOURISM

This seminar was organised jointly by ETC, the World Tourism Organization, European Cities Marketing and MODUL University in Vienna. The event was an exceptional occasion to officially launch the ETC Study on Consumer Lifestyle Trends & Tourism.

The seminar provided a unique platform to discuss the key trends that are impacting travel and tourism in the short- and long-term and explored relevant topics such as the impact of changing consumer behaviour and emerging digital technologies on the tourism sector as well as shifts in travel preferences and tourism beyond relaxation.

The quarterly reports now include topical research pieces relevant to the trends and markets under discussion.

The report can be accessed on ETC’s corporate website, www.etc-corporate.org/trends-watch

ETC-UNWTO ROUNDTABLE EXPLORING HEALTH TOURISM

The roundtable Exploring Health Tourism held in Budapest, Hungary, was convened by the World Tourism Organization and ETC as part of their joint research programme. Supported by the Hungarian Tourism Agency, the aim of the event was to better understand and explore the growing segment of wellness and medical tourism.

The occasion brought together experts from the World Health Organization, the European Union, the World Travel and Tourism Council (WTTC), the European Spas Association, the Global Wellness Institute and Spaincares, among others. Discussions were based on the ongoing ETC and UNWTO research on health tourism. A report on this research will be published to provide a coherent conceptualisation of health tourism and define the motivations behind travellers looking for health-related services.

NTO BUDGETS SURVEY 2016

The NTO Budgets Survey is a successful example of a benchmarking tool produced as a result of the great collaborative work and commitment of ETC member organisations to share sensitive budgetary and structural information with the aim of improving strategic decision-making.

In 2016, 27 ETC members contributed to the study by providing budgetary data and structural information. In addition, the survey included a special question regarding NTOs’ engagement in public-private partnerships. ETC is grateful for its members’ input and would like to thank them for the time they have invested to make this research possible.

The study has been carried out as a joint project between the National Tourism Development Authority of
RESEARCH ACTIVITIES

Fáilte Ireland and the ETC Executive Unit with input from ETC’s Market Intelligence Committee.

The NTO Budgets Survey is a yearly report and is available upon request for participating ETC members only.

ETC SNAPSHOTS – SHOPPING TRAVELLER
ETC Snapshots is a series of lean reports on selected travel segments. They provide a quick overview of travellers’ characteristics, the likes and dislikes of their holiday experience and their satisfaction with Europe compared to competing regions. The reports supplement existing knowledge on markets and segments with survey data on visitors’ satisfaction. While past reports have focussed on the ‘family’ and ‘cultural travel’ segments, the latest report features relevant insights on the ‘shopping traveller’.

Shopping has been recognised as one of the most popular activities for travellers from both advanced and emerging economies. Shopping tourism is on the rise and therefore receiving increased attention from policymakers, tourism experts and business leaders worldwide. This form of tourism as a main motivation for travel has recently evolved and so, with Europe considered to be the epitome of luxury shopping, it is vital to continue investing in gaining further insights on the needs and expectations of this market segment.
Facts & Figures

2.平均年均发展于2021年。
3. Europe’s share of total Brazilian outbound travel in 2016.
4. familial roots, quality of life, multiculturalism and history dominate Brazilian travellers’ perception of Europe.

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1. ETC European Tourism Trends & Prospects (#4/2016)
2. ETC European Tourism Trends & Prospects (#4/2016)
4. The Meaning of Travel and the Perception of Europe as a Travel Destination: Brazil & Russian Federation (2016)
5. Tourism Economics Data (2016)
NEW CHAIRMAN
Bernardo Cardoso, Director of Turismo de Portugal in Brazil, was appointed as the Brazil Operations Group’s new Chairman. Mr Cardoso has a broad experience in marketing and communication acquired in different companies in Europe and Brazil. In his new position, he is responsible for coordinating Europe’s promotional activities in Brazil.

TRAVEL TRADE
The Brazil OG invited 65 tour operators and travel media to a business brunch on 4 November in conjunction with FESTURIS Gramado, the most important travel trade show in southern Brazil. ETC destinations representatives presented the latest data and research on the market as well as what’s new for the 2017 season.

ETC also exhibited at the 28th International Travel Fair – FESTURIS, from 3 to 6 November at Serra Park Convention Center, Gramado. ETC’s stand hosted several European destinations, who presented the continent to more than 14,000 professionals from Brazil and the Mercosur region. South Brazil has big potential for European destinations. The region has the highest GDP in the country and hosts big settlements of different nationalities, such as Italian and German (European diaspora).

PRESS AND PR
THE 27TH EUROPEAN JOURNALISM AWARDS
These prestigious awards recognise exceptional achievements by Brazilian journalists and storytellers in communicating fascinating European travel experiences. This year’s award was launched during WTM Latin America in São Paulo in March. The competition was open to media professionals and media outlets, either traditional or online, which publish in Brazil. For the second year in a row, there was a record number of entries of more than 250 submissions.

The award ceremony took place on World Tourism Day. The winners in eight categories were chosen by a panel of communication and tourism experts, such as Magda Nassar, President of the Brazilian Tour Operators Association (BRAZTOA), Professor Silvia Barreto, University Anhembi Morumbi, and Professor Helena Jacob, University Casper Líbero. The winners were photographers and bloggers, writers from travel magazines and even national TV. Winners visited Flanders, Belgium, and Monaco. The list of winners can be found on www.concursoeuropajornalismo.com.br

In 2016, the Brazil OG issued media releases on topics such as romance, family destinations and Christmas markets. This led to more than 200 articles in traditional and online media in Brazil with an estimated value of more than EUR 2 million.

CONSUMER MARKETING
The popularity of VisitEurope.com’s social media platforms in Brazil grew by almost 40%, reaching more than 60,000 people with 700 reactions (likes, comments, shares) per post, thanks to a new content strategy. This combined original content with curated content, user generated content, video and social media campaigns.

Social media activity also drove traffic to VisitEurope.com, which increased its Brazilian visitors by 35% with page views increasing by more than 20%. The most popular content was pan-European regional travel, UNESCO and religious sites in Europe and gastronomy.
FACTS & FIGURES

**CANADA**
- **RANKS**
  - 3rd among all out-of-region outbound travel markets (excluding Russian Federation)
- **Average annual growth through to 2021**
  - 2.6%

**EUROPE**
- **Tourist arrivals in Europe in 2016**
  - 4.9 million
- **Europe’s share of total Canadian outbound travel in 2016**
  - 15%

**Canadian travellers’ perception of Europe**
- History and heritage

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1. ETC European Tourism Trends & Prospects (#4/2016)
2. ETC European Tourism Trends & Prospects (#4/2016)
3. Tourism Economics Data (2016)
5. ETC-UNWTO Image of Europe in the US and Canadian Social Media (unpublished)
TRAVEL TRADE

More than 130 travel counsellors attended ETC’s Canada OG seminars to learn the latest about Europe. European destinations were joined by local tour operators, Collette and Celebrity Cruises, for two spring evening trade seminars in Toronto and Halifax respectively. This was the first time that the Canada OG had partnered with these tour operators for its annual events.

These seminars helped update local trade knowledge. Special focus was given to increased airline capacity between Canada and Europe as well as on new cultural and gastronomy tours. The VisitEurope.com portal was highlighted during both educational sessions.

The Canada Operations Group also participated in a training event organised by Celebrity Cruises. The seminar took place in Oakville, Ontario, in March and consisted of a morning event with trade and an evening event with trade and consumers. A total of 200 people attended this seminar.

CONSUMER MARKETING

Canadian operator, Collette, together with Air Canada was the main sponsor of the online advertising campaign that the Canada OG carried out in spring during the main booking season for Canadian travellers.

The integrated online advertising campaign was designed to raise brand awareness among 40 to 60-year old consumers with above average household income. The campaign used mainly static and video ads distributed across various travel, lifestyle and news websites as well as on Facebook and Instagram. The campaign had an aggregated reach of 6.4 million. The video ads were seen 3.3 million times. As a result, the VisitEurope.com website saw twenty times more Canadian users during the campaign than the previous period.

EUROPEAN UNION FILM FESTIVAL 2016

The Canada Operations Group renewed its cooperation with the European Union Film Festival (EUFF) in Toronto, aimed at bringing Canada closer to Europe through cinema. The EUFF is a unique collaboration of different European institutions and cultural institutes that strives to reflect the excellence, innovation and diversity of European culture in Canada.

From 10 to 24 November 2016, 28 films with inspiring stories and images of European destinations invited an audience of culture lovers to cross the pond for their next vacation. The screening of all films was preceded by VisitEurope.com videos of Europe’s macro regions such as the Mediterranean, Scandinavia, Central Europe, Baltic Countries and the Balkans.

Promotion campaign of the EUFF 2016.

In addition, the official communication campaign of the 2016 EUFF used VisitEurope.com images to reach consumers all over the Toronto metropolitan area via newspapers, billboards and online for weeks prior to the festival. The Operations Group also ran a social media sweepstakes around the EUFF, which generated hundreds of new leads and newsletter subscribers, and a survey among the festival public to assess travel behaviour patterns and brand perception of Destination Europe. The EUFF attracted more than 8,500 potential visitors with high disposable incomes – a key target group for ETC in Canada. This promotional activity capitalised on the strength of audio-visual content to increase brand awareness and appetite for European travel.
FACTS & FIGURES

**EUROPE’S SHARE OF TOTAL US OUTBOUND TRAVEL IN 2016**

- 1st UNITED STATES RANK 1st AMONG ALL OUT-OF-REGION OUTBOUND TRAVEL MARKETS (excluding Russian Federation)
- 27.5 MILLION TOURIST ARRIVALS IN EUROPE IN 2016

**AVERAGE ANNUAL GROWTH THROUGH TO 2021**

- 5.2%

**INNOVATION AND CULTURAL LIFESTYLE, HISTORIC LANDMARKS AND NATURAL LANDSCAPES DOMINATE US TRAVELLERS’ PERCEPTION OF EUROPE**

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1. ETC European Tourism Trends & Prospects (#4/2016)
2. ETC European Tourism Trends & Prospects (#4/2016)
3. Tourism Economics Data (2016)
NEW CHAIRWOMAN
Alison Metcalfe, Executive Vice President, US & Canada at Tourism Ireland, was appointed as the new Chairwoman of ETC’s USA Operations Group. Ms Metcalfe has worked with Tourism Ireland and the Northern Ireland Tourist Board since 1992, initially in Canada - where she also served as Chair of ETC’s Canada Operations Group – and, since 2007, in the USA. In her new position, Ms Metcalfe has the support of Bruno Bedholm (VisitDenmark) and Line Vreven (VisitFlanders), who both serve as Vice-chairs.

CONSUMER MARKETING
With the goal of driving bookings and engagement from American travellers, the USA Operations Group and Expedia - the online travel agency with the largest market share in America - launched a two-part cooperative online campaign that ran in the spring and autumn.

The first part of the campaign, designed to drive demand, featured creative content that encouraged Americans to explore culture, urban, seaside and outdoor destinations across Europe. The second part, designed to generate engagement, invited Americans to test their knowledge of Europe’s hidden treasures through an online quiz, for a chance to win a trip to Europe. As a result of the campaign, US travellers spent more than 112,000 minutes engaging with VisitEurope.com content. The spring phase generated more than $18 million in bookings and there were nearly 14,000 entries to the competition. The Treasures of Europe campaign received the 2016 Expedia Partner Award for the North America Destination Campaign of the Year. This campaign was co-funded by the European Union.

The cooperative online campaign with Expedia, as well as a year-round digital advertising campaign, contributed to drive traffic to the VisitEurope.com site, which increased its USA visitors by 24% in comparison with the previous year. The number of page views increased by almost 10%. The most popular content included information about pan-European regions, individual country guides and top 10s.

PRESS AND PR
Panellists at the A Taste of Europe evening in New York City.

The USA Operations Group brought together more than 75 travel industry, media representatives and stakeholders for A Taste of Europe evening in New York City, on 4th October. Guests were immersed in European culture at the event, which highlighted the gastronomy of more than twenty destinations with local hors d’oeuvres, as well as tasting stations with signature wines. In addition, attendees were invited to a panel discussion, moderated by Arnie Weissmann, editor in chief of Travel Weekly, to hear from panellists who engaged in talks on the status quo of travel to Europe for Americans.

EUROPE, AN INCLUSIVE DESTINATION
On the eve of the A Taste of Europe event, ETC, in partnership with the International Gay and Lesbian Travel Association (IGLTA), hosted a media networking reception in the historic High Line Hotel in New York City. Several European destinations attended the media event, which provided a magnificent opportunity to network with journalists, media outlets and other companies specialising in the LGBT travel segment.

ETC and IGLTA media reception in New York City.
CHINA OPERATIONS GROUP

FACTS & FIGURES

2nd CHINA RANKS
2nd AMONG ALL OUT-OF-REGION OUTBOUND TRAVEL MARKETS³
(excluding Russian Federation)

12% EUROPE’S SHARE OF TOTAL CHINESE OUTBOUND TRAVEL IN 2016⁴

10.2 MILLION TOURIST ARRIVALS IN EUROPE IN 2016¹

CULTURE, HISTORY, AUTHENTICITY AND CLEAN ENVIRONMENTS DOMINATE CHINESE TRAVELLERS’ PERCEPTION OF EUROPE⁵

1 ETC European Tourism Trends & Prospects (#4/2016)
2 ETC European Tourism Trends & Prospects (#4/2016)
3 Tourism Economics Data (2016)
4 ETC European Tourism Trends & Prospects (#4/2016)
5 ETC-UNWTO Understanding Chinese Outbound Tourism – What the Chinese Blogosphere is Saying about Europe (2013)
ETC’s China Operations Group, in partnership with Welcome Chinese, hosted the Destination Europe: China Summit in October. This event marked the official start of preparations for the 2018 EU-China Tourism Year.

Ms Lowri Evans, Director General of DG GROW, European Commission, presented Europe’s vision for the EU-China Tourism Year to an audience of one hundred local authorities, operators and media gathered in Beijing. Ms Evans explained how the EU and ETC are preparing an ambitious programme of activities, including high-level summits, business to business matchmaking events and communication marketing campaigns.

Eduardo Santander, ETC Executive Director, said: “The 2018 EU-China Tourism Year is a great opportunity for the European tourism industry to explore the Chinese market but also to learn how to attract Chinese visitors and offer them the best possible experience.”

As a first step towards building new business opportunities between Europe and China, ETC’s China Operations Group wrapped up the summit with a session of technical presentations on European destinations, followed by a speed-dating session between National Tourism Organisations, travel trade and media.

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With a minimalist menu structure and a balanced mix of full-width images, interactive maps and smaller content modules within a grid system, the smart portal design allows users to see a wide range of information within a single page while simultaneously experiencing small bursts of visually compelling images that create a sense of progressive discovery during the browsing experience.

The new portal has a very fast loading speed and is fully optimised for mobile, deploying a clean layout and typography, in order to deliver an easy reading experience on any device.

The new portal also integrates content from the most popular social media networks in China, such as Weibo, WeChat and Youku. VisitEurope.com.cn social media handles in China (Sina Weibo and WeChat) grew their fan base by almost 14% and recorded an average of 255,000 and 3,000 monthly readers respectively.
China is the world’s largest travel market in terms of both outbound travel and expenditure. Lately, European destinations have strengthened their position in this market, attaining 10.2 million Chinese visitors in 2016, accounting for a share of 12% of all outbound travel from China. ETC opened its Operations Group in Beijing in 2010 and has recently delivered extensive market intelligence on the Chinese market.

It was therefore with great satisfaction that ETC welcomed the designation of 2018 as the EU-China Year for Tourism, as announced by Jean-Claude Juncker, President of the European Commission and Li Keqiang, Premier of the State Council of the People’s Republic of China, at the opening of the EU-China summit on 12 July 2016. During 2018, an unprecedented level of attention will be paid to the growing importance of China as an origin market, and the changing preferences and behaviour patterns of Chinese visitors.

The first preparatory actions began in 2016 with the programme of activities to be developed under the World Bridge Tourism project. The programme is supported by the European Union, and implemented jointly by ETC and ETOA. The goal is to increase the flows of visitors from China to the EU through B2B matchmaking between European suppliers and Chinese buyers. The programme combines conferences and B2B workshops between tourism-related EU companies (particularly SMEs) and Chinese operators.

The World Bridge Tourism project will be supported by an extensive programme of research and webinars aimed at enhancing understanding of the needs of Chinese visitors within the European tourism community. All types of tourism operators within Europe are invited to take part in the events and participation is free of charge.

As part of its efforts to attract Chinese visitors to Europe, ETC was one of the founding bodies of the Europe China One Belt One Road Committee focusing on Culture and Tourism that was established in the spring of 2016.

The One Belt One Road project is a development strategy proposed by the Chinese government. OBOR focusses on connectivity and cooperation between the People’s Republic of China and the rest of Eurasia. The newly-founded Committee on Culture and Tourism aims to capitalise on the potential of the OBOR framework to create a high-level network between European and Chinese partners with experience in diplomacy, business and politics with a special focus on culture and tourism.

The inauguration ceremony in the Chinese cultural centre in Brussels brought together Members of the European Parliament, officials from the European Commission, including Commissioner for Youth, Sport, Education and Culture, Tibor Navracsics, the President of the Belgian-Chinese Chamber of Commerce, as well as the Chinese ambassador to the EU.

Inauguration of the Europe China One Belt One Road Committee focusing on Culture and Tourism in the Chinese Cultural Centre in Brussels.

Prof. Dr. Wolfgang Georg Arlt, Director of COTRI, Eduardo Santander and Tom Jenkins, CEO of ETOA, at the WTB launch in London, UK.
THE MARKETING GROUP (MKG) IN 2016
Chair: Elke Dens, Belgium-Flanders
Vice-chair: Marketa Chaloupkova, Czech Republic
Vice-chair: Angela Varela, Greece
Coordinator: Miguel Gallego, ETC

MKG ANNUAL MEETING
The second Annual Meeting of the Marketing Group took place in February in Prague, organised with the support of Czech Tourism. For the first time, the meeting was held in conjunction with ETC’s Market Intelligence Group (MIG) Annual Meeting with the intention of streamlining the activities of the association.

The event brought together more than forty marketing and research experts of European National Tourism Organisations for two days and provided a unique platform to share knowledge, key trends and best practices in fields such as crisis management, brand equity, product development, ROI and social media. In addition, delegates jointly discussed the implementation and expected outcomes of MKG’s annual action plan.

The annual meeting also featured a special session for ETC’s new Associate Members who shared their business intelligence as well as practical solutions via successful case studies. The annual meeting was preceded by the Destination Branding 2016 seminar organised by the Ministry of Regional Development of the Czech Republic with the support of UNWTO.

CRISIS COMMUNICATION SEMINAR
The Marketing Group, together with the World Tourism Organization (UNWTO), organised a workshop with European countries to discuss crisis communications in tourism. The event was held in December at UNWTO headquarters in Madrid. The session addressed how crises have a transversal impact, and how the perception and image of destinations are affected by them. There was a focus on strategic crisis communications, media relations and the use of big data.

This seminar was part of ETC’s initiatives in the field of crisis communications, including the European Tourism Crisis Communication Plan that the Marketing Group started developing this year in response to increases in security concerns within long-haul markets, about safety and security concerns and shifts in perceptions about Destination Europe.

DIGITAL TOURISM THINK TANK
MKG renewed its partnership with the Digital Tourism Think Tank to deliver an insightful event on digital at #DTTT Global in Brussels in December. The event focussed on how digital is transforming the entire travel and tourism industry. More than forty delegates from member NTOs attended this flagship event.

As part of this year’s partnership, the Digital Tourism Think Tank organised two webinars for the Marketing Group. The first webinar entitled ‘what millennials crave: the new disruptors’ provided an understanding of the profile and the different experiences that millennial travellers demand. The second webinar entitled ‘crafting your destination’s story’ looked at how to design an impactful content plan on a par with the latest consumer trends at each stage of the planning cycle.
DESTINATION EUROPE 2020

MARKETING

NEW CONSUMER VISUAL IDENTITY
ETC has developed a new consumer visual identity for Destination Europe that will be used by public institutions and stakeholders, Destination Marketing Organisations and the broader travel and tourism industry, in both present and future promotion and communication activities. A manual and toolkit, containing different types of creative assets and promotional materials, were produced to serve as a guide for third parties. This will enable them to make use of the visual identity, ensuring consistency of appearance, and also build recognition among target audiences.

FOCUS ON CONTENT
MARKETING AND DISTRIBUTION
ETC has developed and published 100 new pieces of pan-European content in six different languages and deployed new technical features on the VisitEurope.com portal. Combined, these features have expanded the inspirational capabilities of the portal and enhanced its user experience. This has led to a year-on-year increase of 20% and 24% in terms of web sessions and users respectively.

The increase in web traffic was also influenced by a comprehensive social media strategy aimed at raising awareness, reach and engagement of market-relevant pan-European content. This led to a substantial increase in fan base and engagement on all VisitEurope.com associated social media platforms.

ETC has established global handles in the most relevant social media platforms worldwide:
- Facebook/VisitEurope
- @VisitEurope
- @Visit_Europe
- YouTube/VisitEurope
- Pinterest/VisitEurope
- Google+/VisitEurope
TOWARDS JOINT PROMOTION OF DESTINATION EUROPE

ETC’s co-operative online marketing campaign with the online travel agency Expedia (see USA Operations Group) provided valuable intelligence and a deeper understanding of joint marketing programmes with the private industry.

In addition, ETC, in partnership with the European Tourism Organisation (ETOA), hosted a workshop with the travel and tourism industry in London in November. The objective was to engage with key industry stakeholders and gather extensive knowledge on how the travel industry can jointly market ‘Destination Europe’ to overseas travellers.

The understanding gained from these activities fed into a proposal for a sustainable business model to the European Union for the implementation of a financial platform to support the promotion of European destinations and tourism products in strategic third markets. The platform is known as the Joint Promotion Platform and it will be implemented by European tourism authorities of various levels in partnership with the private sector in the near future.

RESEARCH

EVALUATION PILOT CAMPAIGN IN THE US

Rapid advances in technology have created a new generation of tech-savvy consumers with access to a wide range of sources of information. At the same time, these consumers are increasingly exposed to countless types of promotional material through different media channels and devices and this is significantly influencing their decision to visit Europe. Consequently, ETC is increasingly challenged to create a deeper engagement between the Destination Europe brand and online consumers and to accurately demonstrate marketing impact.

With a focus on pan-European experiences, ETC implemented a pilot online marketing campaign together with Expedia Media Solutions. The aim of this was to increase the visibility of Destination Europe and build strategic partnerships with key players from the private tourism industry. Towards this end, ETC evaluated the successful implementation of the joint promotion campaign within the United States travel market. The investigation also served to research and demonstrate the potential and the value of a sustainable joint marketing initiative through primary research.
ETC DASHBOARD DEVELOPMENT
The Executive Dashboard is the single-entry point to ETC’s vast market intelligence. It has been conceived as a data hub for collecting indicators critical to monitoring tourism performance in Europe and in key source markets. Smart technology links statistics to ‘soft’ information from news and studies, to help users gain deeper insights on outbound travel markets and the latest travel trends.

This platform is an ongoing project under the EC-ETC initiative Destination Europe 2020. In 2016, as part of the fourth development of the platform, ETC implemented a new ‘sentiment’ tab with key indicators, directly retrieved from the Long-Haul Travel Sentiment Survey & Index. This new widget allows users to monitor the evolution of the intention to travel in key extra-European markets and provides data broken down by country of origin, age and income groups. In addition, the ETC Dashboard provides information on the most preferred European destinations; the main barriers for travellers choosing Europe for their next holiday; and respondents’ intention to visit other world regions.

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

UNDERSTANDING GROWTH POTENTIAL FROM LONG-HAUL MARKETS
European destinations acknowledge the need to remain competitive in a sector that is swiftly adapting to the diverse needs of travellers from both established and emerging markets. A significant effort is the diversification of the region’s guest mix by targeting potential travellers outside the dominant intra-European markets. In order to assess investments and to reap the economic benefits of increased volumes and spending from emerging extra-European markets, the European tourism sector is in need of a better understanding. ETC commissioned this study in order to investigate the current and future portfolio of extra-European inbound travel and these markets’ potential benefits in terms of growth, volume and inbound revenue. The report provides guidance on investing in select target markets.

The report is available for free download on ETC’s corporate website: www.etc-corporate.org/reports/understanding-growth-potential-from-long-haul-travel-markets
Since 2015, ETC has opened its membership to private organisations and academia. In line with its mission of strengthening the sustainable development of Europe as a tourist destination, ETC has broadened its approach by reaching out to the private travel and tourism industry with the aim of building alliances to jointly support the tourism sector in Europe.

The ETC Associate Membership Programme focuses on public relations and advocacy activities. It enables associates to establish cooperative partnerships on ad-hoc marketing and research projects, and allows involvement with other relevant organisations and agencies focusing on the development of tourism in Europe.

A warm welcome to Eurail Group, STA Travel, Value Retail and Welcome Chinese as they join our European tourism association!

Today, over half a million people of all ages use Eurail and Interrail Passes each year and discover Europe via more than 250,000 km of interconnected railways.

**STA TRAVEL**

STA Travel started as a student travel agency in the 1970s and today is the world’s largest travel company for students and young people.

The company is headquartered in London and Zurich and has over 200 branches in 12 different countries, with franchises and business partners in another 48 countries. STA Travel employs nearly 2,000 people and serves more than 2 million travellers each year.

Moving beyond the student segment, in 2014 the company replaced the Student Travel Association abbreviation with the strapline ‘Start the Adventure’ thereby profiling itself as a comprehensive tour operator attracting adventure-seekers of all ages.

**VALUE RETAIL**

Value Retail is a company specialising exclusively in the creation and operation of luxury outlet shopping destinations - the Chic Outlet Shopping® Villages - which include Bicester Village in the UK.

Through nine villages in Western Europe, Value Retail offers its tourism partners a unique platform of locations, positioned in major markets. The villages benefit from mutual synergies and shared experience between their respective markets, enjoying the advantage of multi-channel marketing and partnerships aimed at discerning international customers. Each village is located an hour or less from at least one major European city and reflects the heritage of its region.

**WELCOME CHINESE**

Welcome Chinese is the standard certification issued by the China Tourism Academy (CTA), a public institute within the Ministry of Tourism in China (CNTA) dedicated to monitoring outbound travel.

Welcome Chinese has as its core value the promotion of a broader understanding of Chinese culture and habits throughout the travel industry, bridging the gap between the expectations of the most important travel population and the offer dedicated to them.

Chinese travellers view Welcome Chinese as the global quality standard for hospitality services in foreign destinations.

**EURAIL GROUP**

Eurail Group GIE is wholly owned by 36 railway and shipping companies and is the organisation dedicated to the marketing and management of Eurail and Interrail passes.

These passes offer flexible rail travel throughout Europe, connecting both countries and passengers alike. The Eurail Group continuously works to improve pass products and is committed to developing relevant and innovative market intelligence in order to meet the needs of different travellers worldwide.

**EXISTING MEMBERS**
2016: AN IMPORTANT YEAR FOR VISA LIBERALISATION IN EUROPE

It is vital that Europe moves towards a more open visa policy if the continent is to grow its share of global tourism. 2016 saw some positive developments in this direction, while concerns remain following the possibility of a suspension of the visa waiver arrangement for US citizens.

ETC applauded the adoption of the Recast of the Schengen Visa Code by the European Parliament in March 2016. The proposal introduces a number of measures to facilitate the process of obtaining a Schengen visa, making it easier and faster for prospective travellers. The European tourism sector is now expecting the Council to move the proposal further, leading to its final adoption as soon as possible.

ETC has also been following with increasing concern the developments in the EU visa waiver reciprocity arrangement with the US. Currently, travellers from the US account for the largest percentage of all extra-European arrivals. ETC urged the European Parliament and the Council to do their utmost to resolve the situation as soon as possible and to not allow visa waiver for US citizens to be put on hold. The ultimate solution to pursue should be full visa reciprocity which is why ETC has called for the US authorities to cooperate and ensure a balanced and fair outcome.

A careful balance needs to be sought between ensuring security for travellers and citizens and, at the same time, allowing travel flows to continue and prevent further negative impact on the tourism economy in Europe. This is reflected by the proposal to introduce a European Travel Information and Authorisation System (ETIAS), tabled by the European Commission in late 2016. If the scheme is introduced then it is vital that the online system is as simple to use as possible, is available in a very wide range of languages, and is equally accessible through mobile devices. Its implementation should be accompanied by the simultaneous introduction of a Schengen eVisa that would improve Europe’s competitiveness.

Also, in order to further offset its impact, ETC believes that it is essential to increase investment in international promotion of European tourism, by investing a fixed proportion of the ETIAS administration fee in marketing Europe as a destination in the affected countries.

SUSTAINABILITY OF THE EUROPEAN TOURISM SECTOR

At the core of ETC’s strategy are the stimulation of competitiveness and the promotion of sustainable growth of the European tourism sector. Sustainable tourism incorporates policies, practices and programmes which consider both the expectations of tourists regarding responsible natural resource management and the needs of communities that support or are affected by tourism projects and the environment.

Tourism has significant potential as a driver of growth for the world economy, however, the travel industry can also negatively impact the environment and local communities. Some marine and coastal environments, historic towns, cities and cultural heritage sites as well as fragile natural environments are particularly vulnerable to pressure. Sustainable development in tourism is therefore a core objective of the European Travel Commission.

In 2016, ETC partnered with the Foundation for European Sustainable Tourism (FEST) in
hosting the 4th Summer School in Leadership and Governance for Sustainable Tourism, which took place in Akureyri, Iceland, from the 5th to 9th October 2016. The conference addressed one of the most important themes in the tourism industry - how to plan and deliver transformative tourism projects and initiatives to generate a sustainable visitor economy. The 2016 event also contributed to the 2017 International Year of Sustainable Tourism for Development, through a publication and a call for action.

The event brought together key representatives of the tourism sector - donors, representatives of European and international organisations, policymakers, industry representatives, project management practitioners, academics and entrepreneurs. Outstanding speakers focussed on sustainable tourism policies, criteria, certifications, best practices, project management, destination management, destination branding, capacity building, public private partnerships, and tourism funding.

Another big project on the theme of sustainability was the awarding of a scholarship to fund research on the framework of sustainable tourism development in Europe. Silvia Fontolan, a student at the University of Bergamo, carried out a benchmarking research project aimed at mapping and quantifying the strengths and weaknesses within the formal environment of European tourism, with the goal of defining guidelines useful in promoting sustainability issues within Europe. The results of the study will be published in 2017.

EUROPEAN TOURISM MANIFESTO FOR GROWTH AND JOBS
2016 saw the growth of the European Tourism Manifesto for Growth and Jobs, an initiative launched in 2015 by European public and private tourism stakeholders including ETC, to raise the profile of the tourism industry among EU policymakers.

On the first anniversary of the Manifesto, on 16 September 2016, the Secretariat and Chairmanship of the Manifesto, held by ETC, presented an overview of the activities and achievements of the year and revealed a newly-created visual identity.

In its first year, the Tourism Manifesto for Growth and Jobs received increasing support from tourism stakeholders, as well as from the European Parliament, European Commission and the Committee of the Regions.

The Manifesto group took part in several events to present the initiative to important representatives of EU institutions and issued a joint statement on the US and Canada visa waiver reciprocity mechanism.

The group also initiated collaboration with DG Culture, creating a foundation for participation in activities under the framework of the 2018 European Year of Cultural Heritage.

The full Manifesto is available for download at www.tourismmanifesto.eu
INTERNATIONAL GAY AND LESBIAN TRAVEL ASSOCIATION

A new partnership was announced on 17 May 2016 in honour of the International Day Against Homophobia, Transphobia and Biphobia. The International Gay and Lesbian Travel Association (IGLTA) and ETC committed to a world where all travellers feel welcome, regardless of their orientation or gender identity.

“When you look at the timeline of LGBT-positive legislation and marriage equality, you see that the majority of destinations paving the way are European,” commented John Tanzella, IGLTA President/CEO. “We look forward to working more closely with ETC in promoting LGBT, welcoming travel to destinations throughout Europe.”

Eduardo Santander, ETC Executive Director, added: “Europe is a welcoming destination and ETC is working closely with its member NTOs to ensure that the European values of equality and tolerance are reflected in our image as a tourism destination. Our partnership with IGLTA is a pillar in our long-term strategy to enhance the competitiveness of the European tourism sector.”

EUROPEAN DESTINATIONS OF EXCELLENCE

A partnership between ETC and European Destinations of Excellence (EDEN) was announced on European Tourism Day, the annual event organised by the European Commission in Brussels. The announcement was made in the presence of Elżbieta Bieńkowska, Commissioner for Internal Market, Industry, Entrepreneurship and SMEs; Tibor Navracsics, Commissioner for Education, Culture, Youth and Sport; and Karmenu Vella, Commissioner for Environment, Maritime Affairs and Fisheries.

ETC and EDEN Network committed to work together and continue investing in strengthening the competitiveness of the European tourism industry as one of the main engines of economic growth and employment in Europe.

“The EDEN network currently comprises 72 off-the-beaten-track destinations and sites in natural areas, which are recognised by the European Commission for their efforts in sustainable development of tourism,” said Xavier Lechien, President of EDEN Network. “We look forward to working closely with ETC to present these European hidden gems to new audiences in international markets.”

Eduardo Santander, ETC Executive Director, commented: “In the course of the past few years, we’ve learned that travellers to Europe are increasingly more sophisticated in their choices. The destinations in the EDEN Network are a source of inspiration to attract both new and repeat visitors. Our partnership with EDEN is a further step towards our long-term goal of consolidating a unique image that differentiates Destination Europe from other international regions.”

Eduardo Santander and Xavier Lechien, President of the EDEN Network.
The European Travel Commission is constituted under Belgian law as an International Association Without Lucrative Purpose (AISBL/IvZW).

Being a non-for-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 2016, ETC was awarded an operational grant by the European Commission to continue its efforts to promote ‘Destination Europe’ in third markets (the Destination Europe 2020 programme).
WHO IS WHO AT ETC

PRESIDENT
Peter de Wilde
(Belgium-Flanders)

VICE-PRESIDENTS
Mark Henry
(Ireland)
Ólöf Yrr Atladóttir
(Iceland)
Leslie Vella
(Malta)

BOARD OF DIRECTORS
Petra Stolba
(Austria)
Michel Vankeerberghen
(Belgium-Wallonia)
Ratomir Ivčić
(Croatia)
Monika Palatkova
(Czech Republic)
Petra Hedorfer
(Germany)

Paavo Virkkunen
(Finland)
Giovanni Bastianelli
(Italy)
Anne Hoffmann
(Luxembourg)
Anca-Pavel Nedea
(Romania)
Marta Blanco
(Spain)

ORGANISATION STRUCTURE
ETC MEMBER ORGANISATIONS

FULL MEMBERS

Austria
Austrian National Tourist Office [ANTO]

Belgium
Flanders: Visit Flanders
Wallonia: Wallonie-Belgique Tourisme [WBT]

Bulgaria
Bulgarian Ministry of Tourism

Croatia
Croatian National Tourist Board [CNTB]

Cyprus
Cyprus Tourism Organisation [CTO]

Czech Republic
CzechTourism

Denmark
VisitDenmark

Estonia
Estonian Tourist Board - Enterprise Estonia

Finland
Finpro ry

Germany
German National Tourist Board [GNTB]

Greece
Greek National Tourism Organisation [GNTO]

Hungary
Hungarian Tourism Ltd.

Iceland
Icelandic Tourist Board

Ireland
Fáilte Ireland Tourism Ireland Ltd.

Italy
The Italian Government Tourism Board

Latvia
Latvian Tourism Development Agency [TAVA]

Lithuania
Lithuanian State Department of Tourism

Luxembourg
Luxembourg for Tourism [LFT]

Malta
Malta Tourism Authority [MTA]

Monaco
Monaco Government Tourist and Convention Office

Montenegro
National Tourism Organisation of Montenegro

Norway
Innovation Norway

Poland
Polish Tourist Organisation [PTO]

Portugal
Turismo de Portugal, I.P.

Romania
Romanian Ministry of Tourism

San Marino
State Office for Tourism

Serbia
National Tourism Organisation of Serbia [NTOS]

Slovakia
Ministry of Transport and Construction of the Slovak Republic

Slovenia
Slovenian Tourist Board

Spain
Turismo España - Instituto de Turismo

Switzerland
Switzerland Tourism

Turkey
Ministry of Culture and Tourism

ASSOCIATE MEMBERS

amadeus
Emirates
Eurail Group
expedia inc.

Global Blue
sta
VALUE RETAIL