



# ETC BULLETIN

News from the European Travel Commission

Summer 2016

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## The Peace Power of Travel

**A message from the Chair of ETC Marketing Group, Elke Dens**

Recent sad events have reminded us that it is essential human values that really lie at the heart of travel. Travel stands for human understanding, tolerance, acceptance of being different, empathy, freedom and gratitude. These are universal values.

This is what my friend Luis d'Amore from the International Institute for Peace through Tourism taught me about the world's largest industry. He believes that travel will be the world's first global peace industry and that every traveller is potentially an Ambassador for Peace.

Indeed, travel brings people together. It allows us to build relationships, to understand other cultures. Travellers are among the most open and tolerant people. Their frequent encounters with difference make them broad in their mind and positive in their thinking.

"Tourism was created as a way to foster peace and understanding", says Taleb Rifai, Secretary General of UNWTO. Some take it a step further, like Nathan Lump, Chief Editor of Travel & Leisure, who recently said that travel even works against the purpose of radicalism and terrorism. The latter wants to close societies while travel does the opposite. Boundaries divide. Travel unites.



Photo (c) muratart / Shutterstock.com

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## Connectivity for Tourism

**A statement from the ETC Vice-President, Leslie Vella**

After an absence from active ETC affairs of around one and a half years, I decided to become more



closely involved once again, given that, since January 2016, it has been Malta's turn to serve on the organisation's Board of Directors. Following the Vice Presidential vacancy created by the departure of our Portuguese colleague, I submitted my candidature for ETC Vice President and would sincerely like to thank the members who voted for me in such a strong show of support during the ETC General Meeting #91 in Cyprus!

My response to this faith which our members have shown in me will be an unwavering commitment to assist the Board of Directors, so ably chaired by our President

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# ABOUT THE EUROPEAN TRAVEL COMMISSION

## What Is The European Travel Commission?

The European Travel Commission (ETC) is the non-profit organisation responsible for the promotion of Europe as a tourist destination in long-haul markets.

ETC's mission is to strengthen the sustainable development of Europe as a tourist destination and to increase competitiveness, through knowledge gathering and sharing amongst members and lobbying, as well as by establishing a professional marketing platform for the successful promotion of member countries in overseas markets.

## Since When?

ETC was established in 1948 to promote the importance of tourism in revitalising Europe's economy after World War II. ETC's core task has remained unchanged since its foundation more than 60 years ago.

## Who Are Our Members?

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

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



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

## How Does ETC Function?

ETC has its headquarters in Brussels, where its Executive Unit is based. The organisation is headed by a president elected from the directors of its member organisations.

Vital to ETC's activities are its Market Intelligence Group (MIG) and Marketing Group (MKG). The MIG commissions and produces studies, handbooks on methodologies and best practice, and facilitates the exchange of European tourism statistics. The MKG provides the organisation with strategic advice on marketing related aspects.

The work of all the above-mentioned groups is carried out by experts from member NTOs.

## Where Does ETC Operate?

ETC currently promotes and markets the *Europe – a never ending journey* brand and the [VisitEurope.com](http://VisitEurope.com) portal in four major overseas markets: Brazil, Canada, China and the USA. ETC's focus will shift gradually towards emerging markets in the coming years.

The representatives of the European NTOs operating in these markets join together to form an ETC Operations Group (OG) and elect a Chairperson. They decide on a programme of joint activities for the promotion of Europe for the year ahead, propose a budget, and seek local industry support.

## What Are ETC's Activities?

ETC undertakes three basic activities: consumer advertising, market research and advocacy. ETC initiates marketing activities to promote pan-European products and themes, which are complementary to the individual marketing actions of its members. It provides members, industry partners and other interested parties with material and statistics regarding inbound tourism to Europe and best practices.

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

## Who is Who at ETC?



**Eduardo SANTANDER**  
Executive Director



**Teodora MARINSKA**  
Head of Finance and Public Affairs



**Miguel GALLEGO**  
Head of Marketing and Communication



**Stefanie GALLOB**  
Head of Research



**Iulia NICULICĂ**  
Administration Project Manager



**Güneş VURAL**  
Project Manager - Online Marketing



**Jennifer IDUH**  
Research Project Manager

Our three interns are Lyublena Dimova (UCF Rosen College / ISCTE University Lisbon), Vladimira Sajbanova (EMTM - European Master in Tourism Management) and Silvia Fontolan (University of Bergamo).

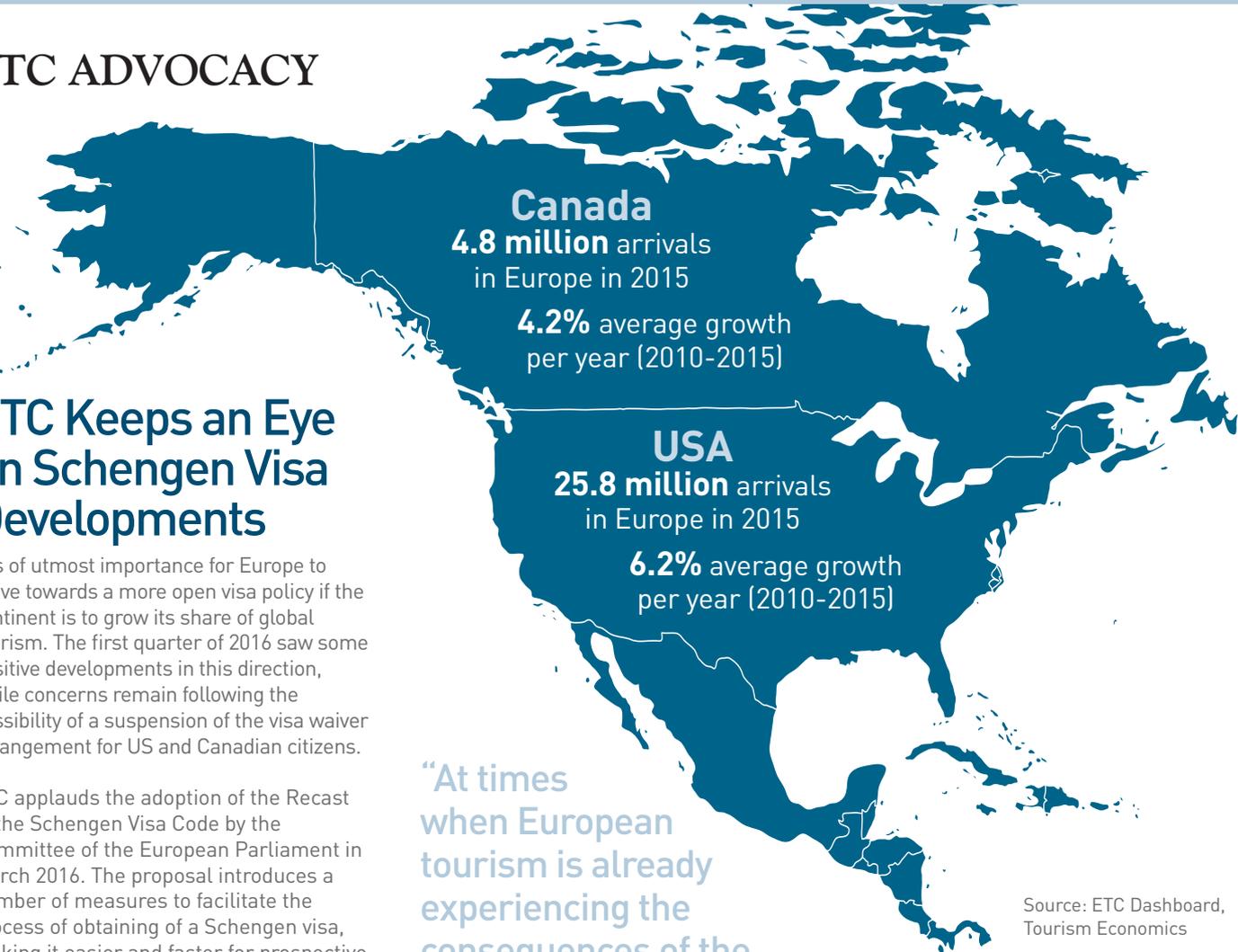
### ETC Keeps an Eye on Schengen Visa Developments

It is of utmost importance for Europe to move towards a more open visa policy if the continent is to grow its share of global tourism. The first quarter of 2016 saw some positive developments in this direction, while concerns remain following the possibility of a suspension of the visa waiver arrangement for US and Canadian citizens.

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

ETC has also been following with increasing concern developments in the EU visa waiver reciprocity mechanism with the USA and Canada. In April 2014, the European Commission was notified that the USA and Canada, whose nationals benefit from an EU-wide visa waiver, continue to apply visa requirements for citizens of some EU Member States. Following two years of negotiations, the EU now has to suspend the visa waiver programme for US and Canadian visitors until full reciprocity is restored.

Currently, travellers from the USA and Canada account for the largest percentage of all extra-European arrivals. In 2015, travel from the US to Europe boomed, aided by a strong economy and a strong US dollar. Both emerging and mature European destinations have seen visits from the US and Canada grow, with arrivals from the two markets reaching 30.6 million tourists. US visitors alone



**Canada**  
4.8 million arrivals  
in Europe in 2015  
4.2% average growth  
per year (2010-2015)

**USA**  
25.8 million arrivals  
in Europe in 2015  
6.2% average growth  
per year (2010-2015)

“At times when European tourism is already experiencing the consequences of the tragic events affecting tourism flows, we saw travellers from North America resilient in their plans to come to Europe. It would be extremely inconsiderate to close our doors to them and renounce billions of export revenue”, Eduardo Santander, ETC Executive Director

spent more than \$54 billion during their stay in 2014. Introducing visa restrictions for US and Canadian citizens would inevitably lead to a steep decrease in these numbers, leaving thousands of jobs in Europe at stake.

Source: ETC Dashboard, Tourism Economics

ETC has urged the European Parliament and the Council to do their utmost to resolve the situation as soon as possible and not allow visa waiver for Canadian and US citizens to be put on hold. The ultimate solution should be full visa reciprocity, so ETC has also called for US and Canadian authorities to cooperate and ensure a balanced and fair outcome.

A careful balance needs to be sought between ensuring security for travellers and citizens while, at the same time, allowing travel flows to continue and preventing a further negative impact on the tourism economy in Europe. In 2015, ETC saw travellers from North America resilient in their plans to come to Europe<sup>1</sup>. Making it more difficult for US and Canadian citizens to travel to Europe would certainly reverse this trend, deprive the European travel and tourism sector of essential revenue, and put thousands of European jobs at stake in one of the few sectors which experiences a strong growth in employment.

<sup>1</sup> ETC, Long Haul Travel Sentiment Index 2015.

# ETC ADVOCACY

## Update on the Tourism for Growth and Jobs Manifesto



Image © European Union – Source: EP

**The Tourism Manifesto highlights the EU policy priorities for the sector in the coming years:**

- Competitiveness
- Digitalisation
- Good Governance
- Joint Promotion
- Reduce Seasonality
- Skills and Qualifications
- Sustainability
- Transport Connectivity

The document is currently signed by 32 organisations.

Since its launch in December 2015, the Tourism for Growth and Jobs Manifesto has received increasing support from tourism stakeholders, as well as from the European Parliament and the European Commission.

On 16th March, Manifesto stakeholders including the European Travel Commission had the opportunity to present their initiative to Tibor Navracsics, European Commissioner for Education, Culture, Youth and Sport.

Eduardo Santander, ETC Executive Director and Chairman of the Manifesto group, highlighted the role of the tourism sector in the creation of jobs, especially for young people, and in the promotion of the European cultural heritage.

The Commissioner welcomed the initiative and pointed out three areas of possible cooperation between tourism stakeholders and DG EAC - culture, education and sports. He also announced the release of a New Skills Agenda for Europe, which will be useful in closing the gap between the number of job seekers and the number of unfilled tourism jobs.

On 26th April, the Manifesto group was invited for an exchange of views in the European Parliament during the Tourism Task Force Hearing of the Committee on Transport and Tourism.

The Chairman and members of the Manifesto Steering Group presented the

most urgent and achievable priorities for the sector in the next few months.

Following this successful event, a Networking Reception on the Tourism for Growth and Jobs Manifesto was organised by Amadeus and SME Europe of the EPP (Small and Medium Entrepreneurs of the European People’s Party) and hosted by MEP Claudia Monteiro de Aguiar. At the reception, Antonio Tajani, Vice President of

the European Parliament and Former Commissioner for Industry and Entrepreneurship, emphasised the importance of stakeholders working together in shaping the future of the European tourism.

The Manifesto is currently supported by 32 organisations / associations. The full lists of stakeholders are available online at [www.tourismmanifesto.eu](http://www.tourismmanifesto.eu)



From left to right: Carlo Corazza, Head of Unit F4 'Tourism, Creative and Emerging Industries' at DG GROW, Eduardo Santander, ETC Executive Director, Juan Jesús García, Senior Advisor at Amadeus, MEP Cláudia Monteiro de Aguiar, Chair of the SME Working Group on Tourism, MEP Claudia Țapardel, Antonio Tajani, Vice-President of the European Parliament, MEP István Ujhelyi, MEP Maria Grapini and MEP Paul Rübzig.

## ETC PARTNERSHIPS



From left to right: MEP István Ujhelyi, Vice-Chair of the TRAN Committee and President of the Tourism Task Force, Tibor Navracscsics, European Commissioner for Education, Culture, Youth and Sport, H.E. Ambassador YANG Yani, Head of the Chinese Mission to the EU, Bernard DEWIT, Secretary General of the OBOR Committee, Chairman of the Belgian-Chinese Chamber of Commerce and Eduardo Santander, ETC Executive Director.

### Europe and China Building Bridges Together

Adding to its efforts to attract Chinese visitors to Europe, ETC is one of the founders of the recently established Europe China One Belt One Road Committee focussing on Culture and Tourism.

The One Belt One Road (OBOR) 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 One Belt One Road project focusses on connectivity and cooperation between the People's Republic of China and the rest of Eurasia.

including the Commissioner for Youth, Sport, Education and Culture, Tibor Navracscsics, the President of the Belgian-Chinese Chamber of Commerce, as well as the Chinese ambassador to the EU.

The inauguration ceremony in the Chinese Cultural Centre in Brussels gathered together Members of the European Parliament, officials from the European Commission,

## ETC Welcomes STA Travel and Eurail Group

ETC opened its doors to private organisations and academia at the end of 2015, when the organisation was joined by Amadeus, Expedia, Emirates and Global Blue. Following upon its mission to strengthen public-private dialogue and partnership within the European tourism sector, the ETC General Meeting #91 approved the applications of STA Travel and Eurail Group.



### 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.



### 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. 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. 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.

## ETC PARTNERSHIPS

### ETC Partners with IGLTA to Strengthen Promotion of LGBT-Welcoming Tourism in Europe

The partnership was announced on 17th May 2016 in honour of the International Day Against Homophobia, Transphobia and Biphobia, a global celebration of sexual and gender diversity. IGLTA and ETC committed to a world where all travellers feel welcome, regardless of their orientation or gender identity, and share in the goal of strengthening the tourism industry at large.



“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”, says John Tanzella, IGLTA President / CEO. “We want to support our longtime tourism allies, and look forward to working more closely with the ETC in promoting LGBT-welcoming travel to the many diverse and interesting destinations throughout Europe.”

“Europe is a welcoming destination that embraces diversity, 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”, said Eduardo Santander, ETC Executive Director.

Image © Krzysztof Jankowski.

## Connectivity for Tourism

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Peter de Wilde, and the Executive Unit.

In my Vice Presidential duties, I carry the advocacy for ‘connectivity’ which is a very important and topical subject and one that is inextricably linked to a destination’s competitiveness and prospects for growth.

Tourism is all about people travelling away from their usual place of residence. As tourism figures grow, trip durations get shorter and gaps between booking and departure continue to narrow, making tourism a more impulsive activity than it ever was. The ease of travelling between a tourist’s area of residence and the selected destination increases in importance.

The concept of connectivity encompasses a wide range of issues which affect tourists’ travel choices - the choice between direct flights and connections, frequency of services, accessibility of small destinations to the major European gateways, seasonality, ease of connecting between different carriers and choice of destinations available from one’s closest airport(s). It also interrelates with a broader range of issues such as security,



ETC members attending the General Meeting #91 in Cyprus on 11th-13th May.

border formalities, the constantly shifting sands of the aviation world and the thin line which separates airline and route profitability from a destination’s desired seat capacity. The potentially direct relationship between the expansion in airline activity and the price of fuel is also a phenomenon which requires closer examination, particularly in view of the implications which may result from an eventual increase in oil prices.

This advocacy carries with it a challenging and interesting responsibility which will entail a wide programme of initiatives ranging from discussions at a European level to meetings with important airline

players and the establishment of contacts and discussions with the aviation world. The experience I have acquired as a result of Malta’s quest to constantly improve its airline connectivity over the past years is an asset which I intend to use in conjunction with the skills, contacts and expertise within the Executive Unit.

Connectivity is one of the most important components of the entire tourism chain and we should never simply leave this to chance. This is where ETC can contribute in a practical manner - not only to its members but to the sustainable development of European tourism in general.

# ETC OPERATIONS GROUPS

## The Brazil Operations Group

### ETC Announces New Chairs of Brazil and USA Operations Groups

Bernardo Cardoso, Director of Turismo de Portugal in Brazil, and Alison Metcalfe, Executive Vice President, US & Canada at Tourism Ireland, are the new Chairs of ETC's Operations Group in Brazil and the USA respectively. The appointments were announced during the last ETC General Assembly in Ayia Napa / Protaras, Cyprus.

Bernardo Cardoso has broad experience in marketing and communications acquired in Europe and in Brazil. He will be responsible for developing new partnerships with the tourist industry and coordinating Europe's promotional activities in Brazil. He takes over from Salvatore Costanzo of ENIT- Italian Government Tourist Board.

Portugal is the most attractive European destination for Brazilian travellers and the first one they visit in Europe. In 2015,



From left to right: Bruno Bedholm (VisitDenmark), Alison Metcalfe (Tourism Ireland) and Line Vreven (Visit Flanders).

Bernardo Cardoso (Turismo de Portugal).

Portugal registered a total of 555,541 international tourist arrivals from this market. Of all European nations, Portugal enjoys the closest ties with Brazil resulting from ancestral roots, language, culture and lifestyle.

Alison 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 OG - and, since 2007, in the USA. She previously worked for VisitBritain (formerly BTA) in London, Portugal and Toronto. She replaces Eugenio Magnani from Italy, who retired at the beginning of the year. Ms Metcalfe can count on the

support of Bruno Bedholm (VisitDenmark) and Line Vreven (VisitFlanders), who both continue as vice-Chairpersons of ETC's USA OG.

Ireland continues to appeal to the US traveller and remains one of the top European destinations. Latest figures from Ireland's National Tourism Development Authority indicate that there were 1.3 million US travellers to Ireland in 2015 - a 13% increase on the previous year. This positive trend has remained over the last three years, with the number of visitors from this market growing on average 14% per year attracted by the destination's breathtaking scenery and history.

## The 2016 European Journalism Competition

ETC in Brazil has launched the 27th 'Concurso Europa de Jornalismo', the prestigious European journalism competition.

"This initiative encourages and recognises the work of journalists who contribute to the development and consolidation of the tourism image of Europe in Brazil", said Bernardo Cardoso, Chair of ETC's Brazil Operations Group.

This year, winners of the so-called 'Oscars of travel journalism' will take part in a trip especially designed to better understand and experience the romantic side of Flanders, northern Belgium and the Principality of Monaco. The 2016 edition of the award was launched during WTM Latin America in São Paulo in March.

"Both traditional and online media play an important role in inspiring and informing travellers about European destinations. We recognise the hard work of these professionals and it is a pleasure to thank them with what we do best: unique experiences for travellers", commented Visit Flanders' Manager for Brazil, Katrien Dejonghe.



The competition is open to journalistic works written by one or more media professionals and published in a Brazil media outlets (online or offline) between 1st July 2015 and 31st July 2016. There are eight award categories. The competition closes on 31st August 2016. For more information or to register, go to [www.concursoeuropajornalismo.com.br](http://www.concursoeuropajornalismo.com.br)

# ETC OPERATIONS GROUPS

## The Canada Operations Group

### ETC Updates the Retail and Media Travel Community in Canada and China

Europe is the number one destination for tourism worldwide and, with spring being the key booking period, what better time for ETC to host a series of evenings showcasing all things European?

In Canada, more than 300 travel counsellors turned out last March and April at Toronto and Halifax seminars to learn the latest about Europe. Several European destinations joined ETC and Canadian tour operators Collette and Celebrity Cruises respectively for two evening trade seminars to update local trade on what is new across the Atlantic. This is ETC's first time partnering with Collette and Celebrity Cruises for these annual events.

It has never been easier for Canadians to head to Europe thanks to increased airline capacity.

"We know that seat capacity to Europe is higher this summer than last year," said Laura Pena, Chair of ETC in Canada. "The Conference Board of Canada is forecasting



František Reismüller welcomes participants in the ETC media roundtable in Shanghai.

9% growth in visits from Canada this summer, thanks in part to 15% more air seats."

"For Ireland, being an island, access is crucial", said Dana Welsh, Manager Canada at Tourism Ireland. "Increased air capacity is one of the main reasons for a 56% increase in traffic over the past two years."

In China, more than 50 journalists and key opinion leaders joined ETC and its member countries last March in Beijing and Shanghai to discuss Europe's tourism product, visa policy and how to work

closely with Chinese and local travel industry partners. Hainan Airlines also participated in the event and presented its new direct flights from China to Europe.

The media roundtables showed Europe's strong confidence about the Chinese market. Last year, Chinese tourists ranked number one in outbound travel and overseas tourism consumption and, according to CNTA's latest figures, the trend will remain in 2016.

Mr František Reismüller, Chair of ETC in China, explained that: "ETC's priority is to engage with our partner countries and local industry to increase awareness of Europe as an inspiring, authentic, diverse, sophisticated and welcoming travel destination to Chinese visitors."

There are a lot of opportunities in China for European destinations with the growth in the 70s and 80s generation of outbound travel, FITs, self-driving and family tours. Europe as a whole destination is perfect for FIT travellers thanks to the short distances between destinations and excellent train connectivity that makes it easy to jump from country to country and check off several bucket list locations as part of the same trip.

Excellent facilities and good road networks make Europe the perfect destination for self-driving. In addition, European history, culture and world-famous luxury brands, gourmet food and sports attract family travellers.



Members of ETC Canada Operations Group and Doug Patterson (left), President, Canada, Collette.

## MARKETING ACTIVITIES

# ETC Brings Together Experts and Industry Leaders to Share the Latest Trends in Travel and Tourism in Europe

The Annual Meeting of the ETC Market Intelligence Group (MIG) and the Marketing Group (MKG) brought together more than 40 marketing and research experts from European National Tourism Organisations and took place in Prague from the 18th to 19th February. This was the first time that the annual meeting of both working groups was jointly held.

The event, organised with the support of Czech Tourism, offered ETC members 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 discussed the implementation and outcomes of ongoing and future research and marketing activities of the organisation.

“This reunion is a milestone in the history of the organisation”, commented Eduardo Santander, ETC Executive Director, during his welcome to delegates.

**“Effective marketing requires a disciplined focus, consistency of message and proactive attention. It must be research-driven and specially formulated to provide realistic answers to market needs”**

He continued: “ETC has a long tradition of producing invaluable market research for our members. This must now be paired to a corresponding marketing strategy for Destination Europe. Effective marketing requires a disciplined focus, consistency of message and proactive attention. It must be research-driven and specially formulated to provide realistic answers to market needs. That is why it is so significant that we have gathered together.”

The Annual Meeting also featured a special session for the new Associate Members of ETC, who shared their business intelligence as well as practical



Prague, location for the Annual Meeting of the ETC Market Intelligence Group (MIG) and the Marketing Group (MKG).

solutions through successful case study examples. Amadeus, Expedia, Global Blue and Eurail Group were among the first industry players that had the opportunity to address and network with the group of NTO experts.

The event was preceded by a day-long educational seminar on destination branding, which showcased different

approaches to building a travel brand. A special focus was given to China as one of the most important source markets for European destinations. The Destination Branding 2016 seminar was organised by the Ministry of Regional Development of the Czech Republic with the support of UNWTO. It took place in the historic Chamber of Deputies of the Parliament of the Czech Republic.

## The Peace Power of Travel

*Continued from page 1*

Every day, every one of us working in the tourism and travel industry is helping to create a journey to an open mind and a gentle heart. It's something to be proud of.

So, let's keep on travelling! And let's work together to tell the world that travel is now more important than ever.



Elke Dens is Marketing Director at VisitFlanders and Chair of ETC Marketing Group.

**Let's keep on travelling! And let's work together to tell the world that travel is now more important than ever.**

# RESEARCH ACTIVITIES



## SHOPPING Travellers

### Where are they from?

Top spenders in Europe

#1 CHINA #3 USA  
#2 RUSSIA

### Traits:

Nationality is an important determinant of differences in shopping time, items purchased and shopping expenditure. Other factors influencing shopping while abroad are: age, gender, trip purpose, and style. Long-haul shopping travellers are motivated to buy because of lower taxes, availability of products that they cannot find in their countries, higher quality of products and services and the connection of the product with its place of origin as part of the travel experience.

### How big is their budget?

around **20-50%** ...of travel budget

### How can you nurture a relationship with them?

Understand that these travellers associate travel with shopping and seek unique experiences that add value to their holiday trip. The majority of them choose tourism destinations based on shopping amenities and services.

## WHY THEY'RE IMPORTANT

Shopping has been recognised as the most popular activity for both domestic and international tourists while travelling abroad. It has also become one of the major areas of tourists' expenditure, and represents a significant source of income for national economies, both directly and through the linkages to other sectors in the economy.

Sources: Frontier Economics (2014). The contribution of the high-end cultural and creative industries to the European economy. London: Frontier Economics Ltd. Lehto, X. Y., Chen, S. Y., & Silkes, C. (2014). Tourist shopping style preferences. Journal of Vacation Marketing, Vol 20(1), 3-15. UNWTO, Global Report on Shopping Tourism (2014) Image: © Oillyy

## Now Available: ETC Study on Consumer Trends and Tourism

ETC is delighted to announce the launch of the *Study on Consumer Lifestyle Trends & Tourism*, a report that will be released in five individual trend sections and published on the ETC corporate website.

The study thoroughly investigates the existing kaleidoscope of consumer lifestyle trends from a global perspective and provides a better understanding of long-term behavioural and attitudinal trends in consumers' lifestyles that are shaping travel preferences.

In addition, it outlines opportunities and provides strategic recommendations for European National Tourism Organisations / National Tourism Authorities (NTOs/NTAs) and Destination Management Organisations (DMOs) for marketing tourism products, themes and destinations in the most promising market segments.

In today's volatile climate, changing consumer behaviours have an increasing impact on global commerce. The speed of consumer change, the blurring of traditional demographic boundaries, the growing power of the consumer and the nature of globalisation are making trend determination and their adequate exploitation the key to success. This is particularly important in the tourism sector, where travellers' choice of goods and services is instrumental for living an experience.



Shifts in consumers' travel attitudes and behaviour in terms of experiences sought and responses to marketing messages will influence their travel product and destination choices.

The report is available for the public and can be downloaded from the ETC corporate website.

## The Shopping Traveller - a Phenomenon on the Rise

*ETC Snapshots* comprises a series of lean reports on select travel segments and markets. These reports provide a swift overview of travellers' characteristics, the likes and dislikes of their holiday experience and their satisfaction with Europe in comparison with competing regions. In addition, key recommendations are given with the aim of providing support to ETC's members.

The latest report investigates the Shopping Traveller. Shopping tourism is recognised as one of the most popular activities for travellers from both

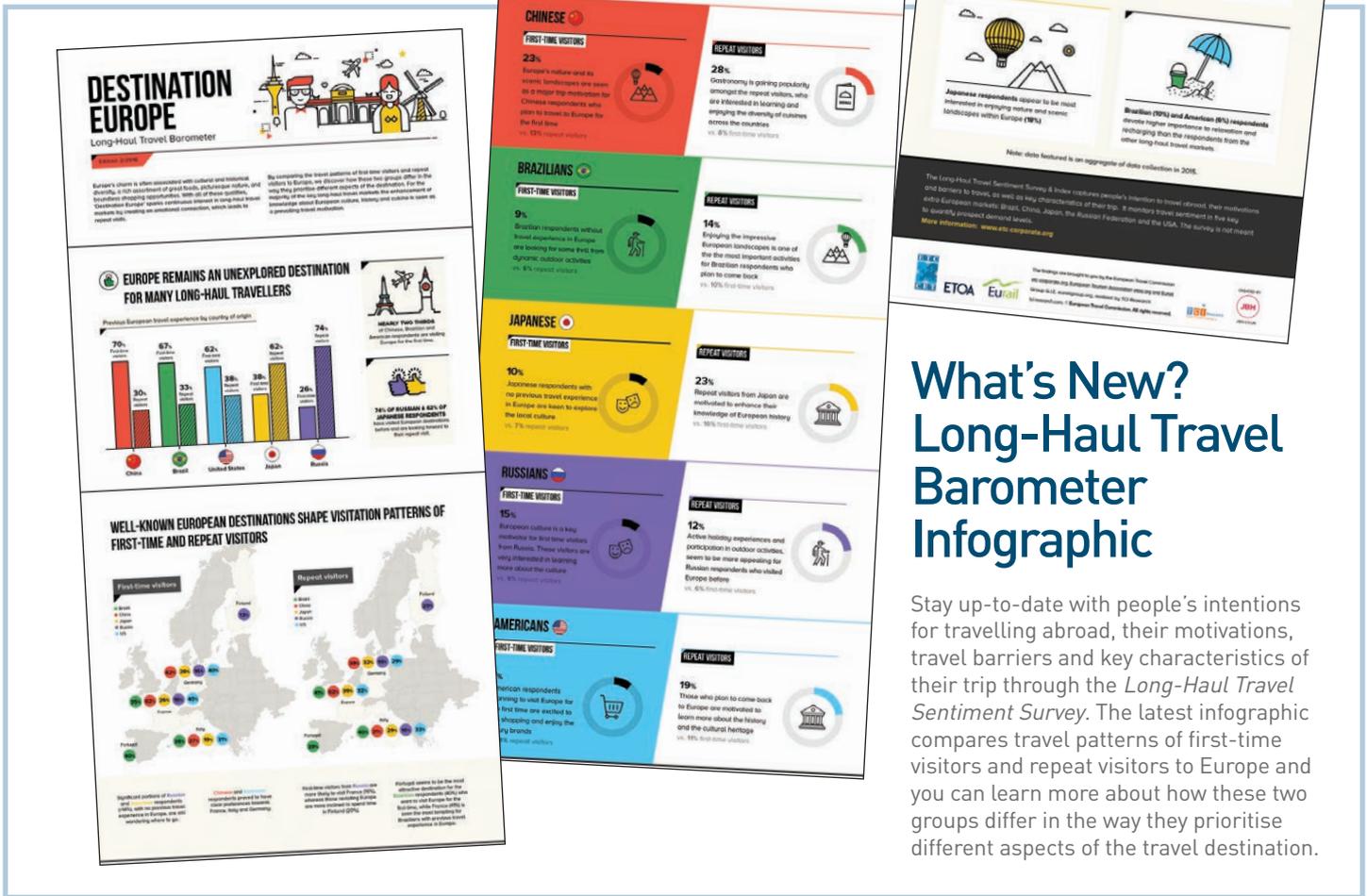
advanced and emerging economies. This form of tourism is on the rise and receiving increased attention from policy makers, academics and business leaders worldwide. Therefore it is essential to continue investing in gaining further insights on this market segment so as to satisfy their needs and expectations and also to increase the flow of shopping tourists to a tourism destination.

The report is available for ETC members only. Please contact us to obtain a copy.

## Calendar of Webinars 2016

**23 June 2016**      Tourism Economics      European Tourism – Trends & Prospects (Quarterly Report)

**3 November 2016** (tbc)      Tourism Economics      European Tourism – Trends & Prospects (Quarterly Report)



## What's New? Long-Haul Travel Barometer Infographic

Stay up-to-date with people's intentions for travelling abroad, their motivations, travel barriers and key characteristics of their trip through the *Long-Haul Travel Sentiment Survey*. The latest infographic compares travel patterns of first-time visitors and repeat visitors to Europe and you can learn more about how these two groups differ in the way they prioritise different aspects of the travel destination.

## Save The Date: International Seminar on Consumer Trends and the Impact on Tourism

### Travel Transformation – Are We Ready?

Modul University, in collaboration with the European Travel Commission and the World Tourism Organization (UNWTO), is organising an International Seminar under the theme *Consumer Trends & Tourism* based on the recently-launched study of the same name.

Preceded by a full-day workshop on the use of the ETC Information Management System on the 8th September, the 12th TourMIS Workshop and International Seminar is expected to attract between 80-100 participants. These will include ETC and UNWTO members, destination management organisations, researchers, academics, consultants and also industry professionals.

**When?** 9th September 2016

**Where?** Modul University in Vienna, Austria

**What will be discussed?** The event will address key issues such as the impact of changing consumer behaviour and emerging digital technologies on the

tourism sector as well as shifts in tourism travel beyond relaxation. It will also be an opportunity to officially launch the Study on Lifestyle Trends & Tourism. In addition, it will provide a platform for exchange of best practice on future research and planned strategies by destination management organisations.

## 12th TourMIS Users' Workshop and International Seminar on Consumer Trends & Tourism

Travel Transformation- Are We Ready?

**8-9 September**    **MODUL University Vienna**

Am Kahlenberg 1, A-1190 Vienna

We look forward to welcoming you in Vienna!

## Save the Date!

## ETC MEMBER ORGANISATIONS

- **Austria**  
Austrian National Tourist Office (ANTO) 
- **Belgium**  
Flanders: Visit Flanders  
Wallonia: Wallonie-Bruxelles Tourisme (WBT)   

- **Bulgaria**  
Bulgarian Ministry of Tourism 
- **Croatia**  
Croatian National Tourist Board (CNTB) 
- **Cyprus**  
Cyprus Tourism Organisation (CTO) 
- **Czech Republic**  
CzechTourism 
- **Denmark**  
VisitDenmark 
- **Estonia**  
Estonian Tourist Board - Enterprise Estonia 
- **Finland**  
Finpro 
- **Germany**  
German National Tourist Board (GNTB) 
- **Greece**  
Greek National Tourism Organisation (GNTO) 
- **Hungary**  
Hungarian Tourism Agency Ltd. 
- **Iceland**  
Icelandic Tourist Board 
- **Ireland**  
Fáilte Ireland National Tourism Development Authority  
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 National Authority for Tourism 
- **San Marino**  
State Office for Tourism 
- **Serbia**  
National Tourism Organisation of Serbia (NTOS) 
- **Slovakia**  
Slovak Tourist Board 
- **Slovenia**  
Slovenian Tourist Board 
- **Spain**  
Turespaña - Instituto de Turismo 
- **Switzerland**  
Switzerland Tourism 
- **Turkey**  
Ministry of Culture and Tourism 

**Associate Members:** Amadeus, Emirates, Expedia Inc., Global Blue, STA Travel, Eurail Group.

## ETC AGENDA 2016

- 81st **ETC Board of Directors' Meeting**, Brussels, Belgium, on 29th June
- **ETC-UNWTO Roundtable on Exploring Health Tourism**, Budapest, Hungary, on 28th -29th June
- **Market Intelligence Committee Meeting #3/2016**, Vienna, Austria, on 7th-8th September
- 12th TourMIS users' **Workshop on Consumer Trends & Tourism**, MODUL University Vienna, Austria, on 8th-9th September
- 82nd **ETC Board of Directors' Meeting**, Brussels, Belgium, on 15th September
- PM4SD™ Annual Event – 4th **Summer School in Leadership and Governance for Sustainable Tourism**, Akureyri, Iceland, on 5th-9th October
- 83rd **ETC Board of Directors' Meeting** and 92nd **ETC General Meeting**, Bratislava, Slovakia, on 23rd-24th November

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