

# ETC BULLETIN

Winter 2016-2017

## World Bridge Tourism: the first step towards 2018 EU-China Tourism Year

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, attracting 10.2 million Chinese visitors in 2016, accounting for a share of 11% of all outbound travel from China.

ETC opened its China Operations Group in Beijing in 2010 and has recently delivered extensive market intelligence on the Chinese market.

It is therefore with great satisfaction that we welcome the designation of 2018 as the EU-China Year for Tourism, as announced by Mr Jean-Claude Juncker, President of the European Commission and Mr 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. Throughout 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.

*Continued on page 5 →*



## A Taste of Europe in New York

More than 75 representatives of the travel industry, media and stakeholders gathered for ETC's USA Operations Group evening *A Taste of Europe* in New York City on 4 October. Guests at the event were immersed in European culture, highlighting the gastronomy of more than twenty destinations with local hors d'oeuvres, as well as tasting stations with

signature wines. Additionally, 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.

The situation on the Continent, given the increase in safety concerns and geopolitical

tensions, received special attention. Peter de Wilde, ETC President commented: "Yes, there have been terrorist attacks but that is a global phenomenon. Yes, we have suffered damage. There is the refugee crisis. There is uncertainty from Brexit. And yet, Europe is still an appealing travel destination."

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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.

### 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 **Europe - VisitEurope.com** 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



### 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.

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



**Jennifer IDUH**  
Head of Research



**Iulia NICULICĂ**  
Operations and Administration Manager



**Güneş VURAL**  
Digital Manager



**Lyublana DIMOVA**  
Research Project Manager

Our intern is Gizem Tüdeş (SKEMA Business School).

→ ETC ADVOCACY



↑ Representatives of supporting organisations and EU institutions at the First Anniversary Meeting of the Tourism Manifesto for Growth and Jobs on 16 September 2016.

# The Tourism Manifesto celebrates a successful first year

European public and private tourism stakeholders, as well as organisations with an interest in the role of tourism, gathered in Brussels to celebrate the first anniversary of the Tourism Manifesto for Growth and Jobs on 16 September 2016.

At the event, the Secretariat and Chairmanship of the Manifesto, held by the European Travel Commission, presented an overview of the activities and achievements during the past year and revealed a newly-created visual identity.

Since its official launch in 2015, the Manifesto initiative has enhanced collaboration between stakeholders who are sharing events and discussing opportunities and urgent issues. The industry, united with a common voice, brought the visitor economy to the attention of European decisionmakers, especially Elżbieta Bieńkowska, European Commissioner for Internal Market, Industry, Entrepreneurship and SMEs, who mentioned the Manifesto initiative in her speeches.

In its first year, the Manifesto group issued a joint statement on the US & Canada

Visa waiver reciprocity mechanism and initiated collaboration with DG Culture, creating a foundation for participation in activities under the framework of the 2018 European Year of Cultural Heritage. The Committee of the Regions took into account the text of the Manifesto while drafting its opinion on "tourism as a driving force for regional cooperation across the EU" which investigates the most urgent issues to be addressed by the tourism sector in the future.

Tourism, Emerging and Creative Industries Unit, DG GROW, European Commission, said: "The Manifesto represents an excellent example of teamwork. The European Commission will try to strengthen this team spirit and help the industry become more competitive."

The anniversary event marked the launch of the first revision of the Manifesto which gave the newest supporting organisations a chance to contribute to the document. The revision process was conducted towards the end of 2016 and the final text was adopted at the General Assembly held on 12 January 2017.



## TourismManifesto FOR GROWTH & JOBS

Eduardo Santander, ETC Executive Director, emphasised that the stakeholders' commitment and active involvement contributed to keeping this initiative alive and to promoting the importance of tourism as the third biggest sector in the EU economy.

The representatives of the EU institutions attending the event congratulated the supporting organisations for these achievements and expressed their continuous support for the initiative in the year to come. Carlo Corazza, Head of the

Looking ahead, the supporting organisations will continue to raise awareness of the initiative and their common priorities among other tourism stakeholders and will ask the European Commission for actions and real pragmatic measures.

The Manifesto is currently endorsed by 40 organisations / associations from tourism and cultural sectors. The full list of stakeholders is available online at [www.tourismmanifesto.eu](http://www.tourismmanifesto.eu)

➔ ETC ADVOCACY

# ETC supports additional investment in tourism promotion through ETIAS

At the end of 2016, the European Commission proposed the establishment of a European Travel Information and Authorisation System (ETIAS). This is a tool that would register all travellers coming to Europe from countries which currently benefit from visa-free agreements. European Commission President Juncker announced the intention to introduce such a system in his 2016 State of the Union address, and listed it as a first deliverable of the priorities for action identified in the Bratislava Roadmap.

In order to identify possible security concerns, visitors who are travelling visa free to Europe will be requested to register on ETIAS prior to their trip.

The European Travel Commission recognises that the ETIAS proposal does not alter existing visa regimes per se, however it does reduce the ease with which travellers can access visa-free travel and that further diminishes Europe's competitiveness in global tourism.

While the European Commission expects ETIAS to "save travellers time and hassle" and believes that the proposal will complement the current visa policy, for the vast majority of travellers it will simply be a new and additional burden.

ETC is concerned that it may present Europe as a less welcoming and friendly place to visit in the eyes of some. Other nations are currently streamlining their visa application processes by lowering fees and simplifying paperwork and processes to stimulate international tourism growth.

This proposal represents a move in the opposite direction for the European Union and will have an impact on reducing growth in European tourism.

The initiative will impact on both established and growing markets such as the United States, Canada, Japan, Australia, Argentina, Brazil, Mexico, Israel and the UAE, to name just a few.

In addition, ETIAS introduces additional process complexities and business costs for both tour operators and carriers. These costs will ultimately be borne by international consumers seeking to holiday in Europe, again further reducing our global tourism competitiveness.

Every new challenge is also a new opportunity. If the scheme is introduced then it is imperative that



➔ From left: Frans Timmermans, First Vice-President of the European Commission in charge of Better Regulation, Inter-Institutional Relations, the Rule of Law and the Charter of Fundamental Rights, and Dimitris Avramopoulos, Member of the European Commission in charge of Migration, Home Affairs and Citizenship, at a joint press conference on the European Agenda on Security and the EC's proposal for a European Travel Information and Authorisation System (ETIAS).

© European Union, 2016 / Source: EC - Audiovisual Service / Photo: Georges Boulougouris.

“ We must grow the desirability of holidaying in Europe. Potential travellers must feel that it is worth investing the time and money in the ETIAS process because an incredible holiday experience awaits them here ”

Mark Henry, ETC Vice-President on Visa Facilitation

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.

In order to further offset the impact of ETIAS, ETC believes that it is essential to increase investment in international promotion of European tourism.

Mark Henry, ETC Vice-President on Visa Facilitation, explains: "We must grow the desirability of holidaying in Europe. Potential travellers must feel that it is worth investing the time and money in the ETIAS process because an incredible holiday experience awaits them here."

ETC therefore believes that a fixed proportion of the ETIAS administration fee should be invested in marketing Europe as a destination in the affected countries.

This approach would be similar to that deployed in the USA where a proportion of its ESTA fee is used to fund the promotional activity of Brand USA. If ETIAS is to be introduced then Destination Europe will need additional investment to offset our loss of destination competitiveness, irrespective of the benefits that the system will offer from a security perspective.

# World Bridge Tourism: taking the first step towards the 2018 EU-China Tourism Year

World Bridge Tourism  
9-10<sup>th</sup> May 2017  
Shanghai



Part of the 2018 EU-China Tourism Year Initiative

← *Continued from page 1*

Eduardo Santander, ETC Executive Director, said: "ETC is looking forward to cooperating with the European Commission and the other EU tourism stakeholders, making sure that we turn this possibility into a great success."

The first preparations are already starting in 2017, with the programme of activities to be developed under the World Bridge Tourism project. The programme is supported by the EU and implemented jointly by ETC and ETOA.

The goal is to increase the flows of visitors from China to the EU by means of B2B matchmaking between European suppliers and Chinese buyers.

The first event will be held in Shanghai in conjunction with ITB China on the 9-10 May 2017. The programme combines a conference and a B2B workshop between tourism-related EU companies (particularly SMEs) and Chinese operators.

“  
**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, attracting 10.2 million Chinese visitors in 2016.**”

The World Bridge Tourism project will be supported by an extensive programme of research and webinars aimed at enhancing the 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.

The project is specifically designed for tourism operators, preferably SMEs; for businesses that have a proven record on working in China or can demonstrate investment in preparations to approach the Chinese market; for enterprises from all tourism sub-sectors; and for organisations which do not fit these criteria but have a proven interest in the Chinese market and add value to the B2B matchmaking process (such as museums and exhibition centres).

To apply, please go to [www.etoa.org/wbt](http://www.etoa.org/wbt)

→ ETC ADVOCACY

# Summer School in Leadership and Governance for Sustainable Tourism

The 4th Summer School in Leadership and Governance for Sustainable Tourism, co-organised by the Foundation for European Sustainable Tourism (FEST) and the European Travel Commission, 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 was hosted by the Icelandic Tourist Board and took place in Akureyri, Iceland, Lonely Planet's number one destination in Europe 2015. The conference brought together key representatives of the tourism sector - donors, representatives of European and international organisations, policy makers, 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.

The annual Summer School promotes

PM4SD™ as a methodology to apply in tourism projects and to discuss the professionalisation of project management in sustainable tourism and the need for leadership in tourism. For the 2017 edition, FEST is currently selecting a host organisation. To apply, visit: <http://summerschool.festfoundation.eu>

→ ETC PARTNERSHIPS

## New ETC associate members



**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 expectation 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.

## VALUE RETAIL®

**Value Retail** is the only company to specialise 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.

→ ETC OPERATIONS GROUPS

The USA Operations Group

# A Taste of Europe is enjoyed in New York

← Continued from page 1



(From left:) Jennifer Andre, Senior Director of North American Sales, Expedia (panellist); Clare Chiu, Director of Business Development, Warwick International Hotels (panellist); Arnie Weissmann, Editor in Chief, Travel Weekly (moderator); Peter De Wilde, ETC President; Steve Cohen, Vice President of Insights, MMGY Global (panellist); Alison Metcalfe, Executive Vice President, United States & Canada, Tourism Ireland & Chair ETC USA Operations Group; Eduardo Santander, ETC Executive Director; and Joe Diaz, co-founder and Chief Product Officer, AFAR (panellist).

He concluded: "There is a lot happening over the next two years to make Europe appealing to demanding cultural travellers. There are so many cities in Europe where travellers can feel people experimenting in new ways of coming together and living. That's what travel is about - connecting to local communities, exchanging views

and ideas, learning about fears and hopes.

If you stop travelling and exchanging these ideas, I don't think that would be a positive evolution. There is a whole side to Europe that people don't know - the authentic Europe. You just have to get out of your comfort zone."

## Europe: an inclusive destination

ETC, in cooperation with the International Gay and Lesbian Travel Association (IGLTA), hosted a media networking reception in the historic High Line Hotel in New York on 4 October. Representatives of several ETC member destinations attended the event which provided a magnificent opportunity to network with journalists, media outlets and other companies specialising in the LGBT travel segment.



The IGLTA and ETC media reception at The High Line Hotel in New York.

## 'Treasures of Europe' recognised as 2016 North America Campaign of the Year



ETC's cooperative promotional campaign *Treasures of Europe* has received the 2016 Expedia Partner Award for the North America Destination Campaign of the Year.

With the goal of driving bookings and engagement from US travellers, ETC and Expedia Media Solutions launched a two-part campaign that ran in spring and autumn 2016. The first part of the campaign, designed to drive demand, featured creative content encouraging Americans to explore cultural, urban, coastal 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 and win a trip to Europe. As a result of the campaign, US travellers spent more than 112,000 minutes engaging with [VisitEurope.com](http://VisitEurope.com) content. The spring campaign generated more than \$18 million in bookings and there were nearly 14,000 entries to the online competition. This campaign was supported by the EU.

→ ETC OPERATIONS GROUPS

The China Operations Group

# The 2018 EU-China Tourism Year: Plans revealed at Beijing launch event

The *Destination Europe: China Summit*, hosted by ETC's China Operations Group and Welcome Chinese, provided the backdrop to kick off preparations for the 2018 EU-China Tourism Year. Ms Lowri Evans, Director General of DG GROW, European Commission, and Eduardo Santander, ETC Executive Director, presented Europe's vision on the EU-China Tourism Year to an audience of local authorities, tour operators and media gathered in Beijing on 26 October 2016.

The Chinese outbound travel market offers destinations worldwide one of the most promising growth opportunities in recent times. Outbound travel from China has grown at a double-digit pace in the last decade, reaching record numbers in 2015. Eduardo Santander pointed out that placing these figures into a European context reveals that Europe reaches only 2% of these travellers (around 10 million each year). That's why more effort is needed to welcome Chinese travellers, as well as to reinforce the positive perceptions that the Chinese have of Europe.

He said: "The 2018 EU-China Tourism Year is a great opportunity for the European tourism industry to explore the Chinese market and also to learn how to attract Chinese visitors and offer them the best possible experience. With millions of arrivals in 2015, Europe is already the place where most Chinese citizens go when they travel outside Asia. And we hope to see more European visitors in China, experiencing the marvels of ancient and modern Chinese culture."

### A unique opportunity to enhance Sino-European cooperation

The EU and ETC are preparing an ambitious programme of activities to mark EU-China Tourism Year, including high-level summits, business to business matchmaking events and communication marketing campaigns. The EU also expects to progress China-EU visa facilitation during the year. At the same time, in terms of market access, the EU will work with Chinese authorities to facilitate investments in their respective tourism sectors. Chinese companies clearly see Europe's tourism potential and have invested heavily in past years. China is progressively opening up to EU investments in its tourism sector and the EU is confident that this evolution will continue.



↑ Ms Lowri Evans, Director General of DG GROW, European Commission, at the Destination Europe: China Summit.

↑ Round-table meetings of European destinations with local operators and media.

As a first step towards building new business opportunities between Europe and China, ETC's China Operations Group wrapped up the *Destination Europe: China Summit* with a session of technical presentations on European destinations. This was followed by a 'speed-dating' session of one-to-one meetings between National Tourism Organisations, the travel trade and media.

Further information on the 2018 EU-China Tourism Year is available on [www.ecty2018.org](http://www.ecty2018.org)



www.visiteurope.com.cn

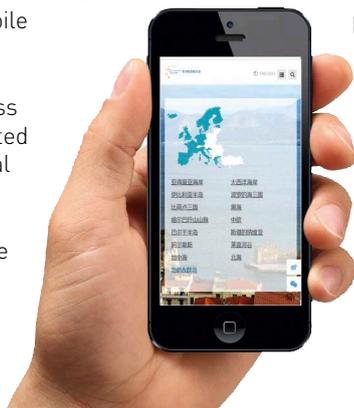
## New VisitEurope.com portal in China is online

Chinese netizens tend to avoid surfing non-Chinese websites because they perform consistently worse than their domestic equivalents. Chinese consumers expect a website to load within 4.8 seconds, but 85% of European websites fail to meet that target.

Also, unlike standard Western online behaviour, the Chinese do not like to type when searching for travel content on the internet as it's difficult for them to write names of places using Chinese characters. Therefore, they use other resources such as tags and interactive maps to quickly surf and find the information they're looking for.

In addition, China has one of the highest smartphone penetration rates in the world and, therefore, it is essential for any website to be mobile responsive.

For those with a boundless desire to travel, the updated [VisitEurope.com.cn](http://www.visiteurope.com.cn) portal is a trusted source of information designed to inspire truly unforgettable and authentic journeys that create a lifelong passion for exploring more of the continent.



[VisitEurope.com.cn](http://www.visiteurope.com.cn) provides Chinese travellers with everything they need to plan a trip to Europe, including practical information such as visa procedures and flight connectivity tips.

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.

With a minimal menu structure and a balanced mix of full-width images, interactive maps and smaller content modules, 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 also integrates content from the most popular social media networks in China, such as Weibo, WeChat and Youku.

## The Canada Operations Group



## EUROPEAN UNION FILM FESTIVAL

### Movies to inspire wanderlust in Europe

ETC's Canada Operations Group worked with the European Union Film Festival in Toronto (EUFFT) to bring Canada closer to Europe.

From 10 to 24 November 2016, 28 films with inspiring stories and images of European destinations invited culture lovers to cross the pond for their next vacation.

The screening of all festival films was preceded by [VisitEurope.com](http://www.visiteurope.com) videos of Europe's macro regions such as the Mediterranean, Scandinavia, Central Europe, Baltic countries and the Balkans.

In addition, the official communication campaign of the 2016 EUFFT used [VisitEurope.com](http://www.visiteurope.com) images that reached consumers all over the Toronto metropolitan area in newspapers, on billboards and online.

ETC also ran a sweepstake on social media which generated hundreds of new leads. This promotional activity capitalised on the strength of audio-visual content to increase brand awareness and generate an appetite for European travel.

## → ETC OPERATIONS GROUPS

### The Brazil Operations Group



↑ Bernardo Cardoso, Chair of ETC Brazil OG, and Anna Laura Wolff, Best Newcomer winner.

← Roberto Maia and Carolina Maia (centre), Best European Story winners with representatives of Flanders (L) and Monaco (R).

# 27<sup>th</sup> European Journalism Award Ceremony: winners announced

This competition, promoted by the Brazil Operations Group, recognises the exceptional achievements of Brazilian journalists and storytellers in communicating fascinating travel experiences across Europe.

The *European Journalism Awards* celebrated its 27th year in 2016 and received a record number of 250 entries.

The awards ceremony took place in the Consulate of Portugal in São Paulo, on 27 September, as part of the World Tourism Day celebrations. Representatives of ETC member destinations in Brazil presented prizes to the eight winners. These included photographers, bloggers, representatives from travel magazines and even from national TV. The winners are invited to visit Monaco and Flanders (Belgium) to discover the most romantic side of Europe.

The winners will travel to Europe with TAP and have the opportunity to experience its Stopover Programme which offers passengers on long-haul flights the chance to take a short break to discover Portugal on their way to another European destination.

The complete list of winners can be found on the official competition website: [www.concursoeuropajornalismo.com.br](http://www.concursoeuropajornalismo.com.br)

## FESTURIS 2016: ETC gathers trade and press in Gramado

ETC's Brazil Operations Group brought together 65 tour operators and tourism media to take part in a business brunch on 4 November at FESTURIS Gramado, the most important travel trade show in South Brazil.

Representatives of ETC destinations in Brazil - Monaco, Norway, Portugal, Spain and Switzerland - presented the latest data and research on the market as well as what's new in their destinations for the 2017 season. Bernardo Cardoso, Director of Turismo de Portugal in Brazil and Chair of ETC's Brazil Operations Group, said: "This is a joyful and relaxing atmosphere, ideal to bring together journalists and operators to strengthen relationships and spread the collective work of ETC in Brazil."

ETC was also present at the 28th International Travel Fair - FESTURIS Gramado - with a stand that hosted several European destinations. The South Brazil region is an interesting market with big potential for European destinations. The region has



↑ Journalists and tour operators gathered at the working brunch hosted by ETC in Festuris.

the highest GDP in the country and includes big settlements of different nationalities, such as Italian and German (European diaspora). They are a very conscious target, demanding more information, new products and travel experiences.

➔ ETC RESEARCH ACTIVITIES

# European Tourism: 2016 performance and outlook for 2017

Europe is still one of the world's most vibrant and appealing destinations for travellers around the world. 2016 marked a year of sustained growth for the European tourism sector with impressive growth posted by the vast majority of 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 620 million international tourist arrivals in 2016, a modest but welcome 2% increase compared to the previous year, as reported by the World Tourism Organization (UNWTO).

The positive performance was driven by the strong tourism demand from key intra-regional and overseas markets. Nevertheless, the handsome growth recorded in several destinations was offset by the declines in those affected by tragic events.

It must not be forgotten that, 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.

In long-haul markets, 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

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 than 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% ”

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 lies

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 matured markets. Only through increased commitment and cooperation from the European authorities will Europe remain competitive and succeed in fostering inbound travel.

“ Europe accounts for more than 50% of the tourism market share globally and welcomed 620 million international tourist arrivals in 2016 ”

EUROPEAN TRAVEL COMMISSION MARKET INTELLIGENCE GROUP & MARKETING GROUP ANNUAL MEETING 2 -4 MARCH 2017 BUDVA

REGISTER NOW

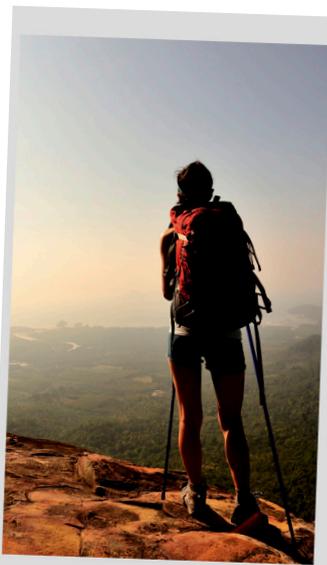
hosted by MONTE NEGRO Wild Beauty

➔ ETC RESEARCH ACTIVITIES

# Nature-active traveller: an adventure seeker!

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

Nature-active travel has been growing in popularity over the last decade. Increasingly, travellers are looking for destinations that offer excitement and a distinctive set of cultural and natural assets to add value to their travel experience. This travel segment is experiencing fast growth in the tourism sector, posing countless



## Nature-Active Travellers

Where are they from?

How can you nurture a relationship with them?

#1 SOUTH AMERICA  
#2 EUROPE  
#3 USA

Destinations developing and offering particular adventurous sports (e.g. climbing, kayaking, etc.) or range of exciting outdoor activities may earn sustained competitive advantages

Traits:

The nature-active travellers are early adopters and often seek to find new travel destinations, dive into new experiences and participate in unusual activities before most people. Often the destination choice depends on the areas' natural beauty, climate, culture and the available activities. The average age of the adventurous travellers is 36 years old. They are highly educated and often perceived as a group with high household income. The highest proportion of them go on a trip with a company- 33% travel with a spouse or partner, 30% with family and 21% with friends.

### WHY THEY'RE IMPORTANT

The natural-active travellers are undoubtedly a fast growing segment. As indicated by ATTA the adventurous market in the Americas and in Europe has experienced an average yearly size increase of 65.6% between 2009 and 2015. Moreover, the contribution of this type of tourism to destinations' economic development is considerably high as 65.5% of the cost of an adventurous package remains in the destination visited

Sources: Adventure Travel Trade Association - Adventure Tourism Development Index 2015; UNWTO - Global Report on Adventure Tourism 2014; The George Washington University & Adventure Travel Trade Association - Adventure Tourism Market Study 2013  
Image: © Ollyy

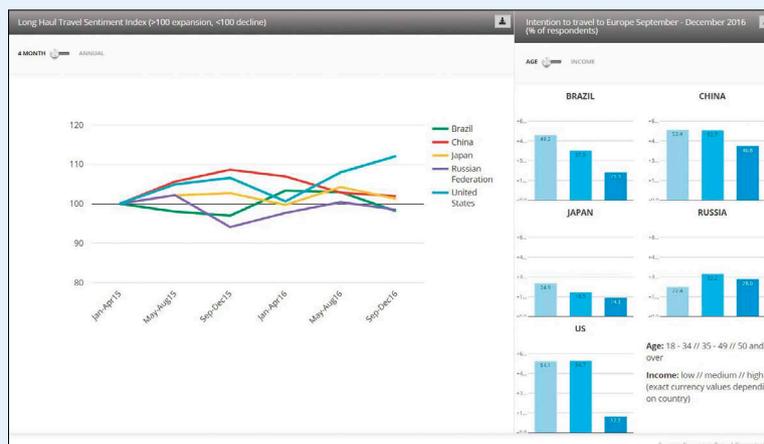
opportunities for tourism destinations. It is thus important that destinations acknowledge the importance of this growing segment to further develop targeted tourism products aimed at attracting

tourists seeking a touch of adventure during their holidays.

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

## ETC Executive Dashboard: new 'sentiment' tab

The ETC Executive Dashboard is a 'data hub' that provides simple access to key indicators and market intelligence information for the travel and tourism industry in Europe. The highly visual and user-friendly interface offers a quick overview of current trends through constantly updated charts. Smart technology links statistics to relevant information from news and studies, to gain a deeper insight on outbound travel markets and travellers' behaviour.



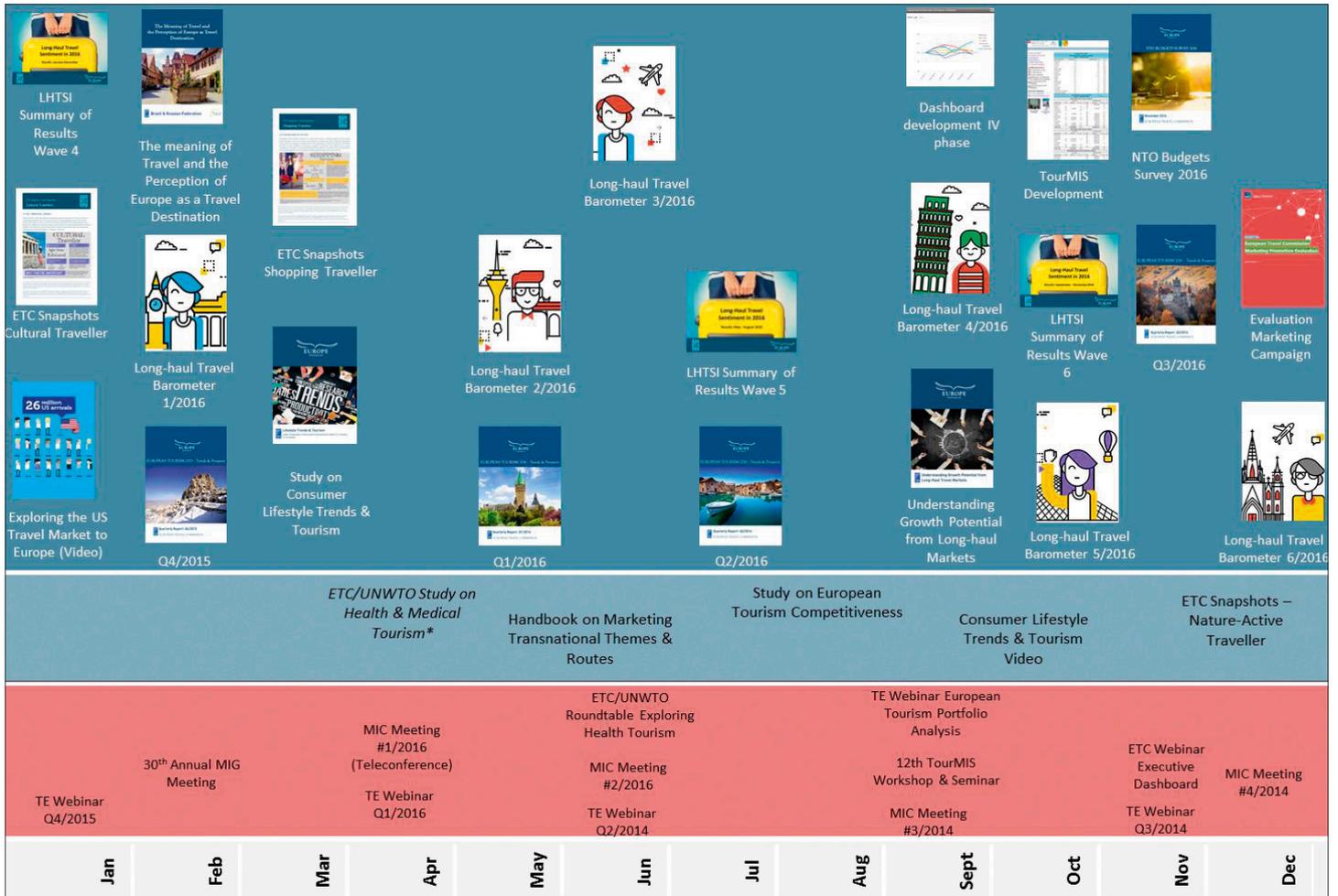
key indicators directly retrieved from the Long-Haul Travel Sentiment Survey & Index. This new widget allows users to monitor the evolution of the intention to travel in key extra-European markets and provides data broken down by country of origin, age and income groups. In addition, the ETC Dashboard provides information on the most preferred European destinations, the main barriers preventing

travellers from choosing Europe for their next holiday, and respondents' intention to visit other world regions.

This platform is an ongoing project under the EC-ETC initiative Destination Europe 2020. As part of the fourth development of the platform, ETC has implemented a new 'sentiment' tab with

The Executive Dashboard [etc-dashboard.org](http://etc-dashboard.org) is a service provided exclusively for ETC members. To receive access credentials please contact the ETC Executive Unit.

# ETC RESEARCH ROADMAP 2016



## Further exploring emerging markets: Gulf Cooperation Council outbound market

In recent years, the Middle East region has become an increasingly important source market for many destinations worldwide. This market is the world's fourth largest travel source market, generating around 3%<sup>1</sup> of the world's international tourist arrivals. Within the region, the Gulf Cooperation Council (GCC) countries – Saudi Arabia, United Arab Emirates, Kuwait, Bahrain, Qatar and Oman are the key source markets constituting altogether about 60% of all outbound travel and about 75% of total international tourism expenditure from the Middle East region<sup>2</sup>. Over the period 2010-2015, outbound travel from the GCC countries to Europe has increased by 17%, coupled with a 3.1% growth in consumer expenditure<sup>3</sup>.



GCC countries are therefore seen as a fast-growing market with strong potential to make a significant contribution to European tourism in the coming years. To leverage this opportunity, ETC will further investigate the potential of travellers from the GCC outbound market with a special focus on Europe as a tourism destination. In the form of a report, the aim of the study is to provide ETC

and its members with a thorough analysis investigating the potential of the GCC outbound market. In addition, the research will shed light on the travel patterns and behaviour of GCC nationals. This will enable the design of targeted and innovative marketing and promotion strategies aimed at increasing tourist flows from this market.

<sup>1</sup>UNWTO Tourism Highlights 2016 Edition  
<sup>2</sup>ETC UNWTO. The Middle East Outbound Travel Market (2012)  
<sup>3</sup>ETC Understanding Potential from Long-Haul Travel Markets (2016)

➔ RESEARCH ACTIVITIES

# New research projects: European tourism competitiveness report



International tourism remains one of the world's most dynamic economic sectors and an important driver of economic and social development. Europe remains the world's #1 tourist destination as many countries realise the potential for tourism as a pillar of their development. Although the region holds more than 50% of the market share of worldwide tourism, its leading position is under pressure as highly competitive new players have entered the global travel marketplace.

The tourism industry is continuously evolving due to the transformation of consumer values, motivations and behaviours. This is impacting on both leisure and business alike. These shifts that the industry is experiencing are substantial and driven by several factors which need to be identified, assessed and understood.

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.

“  
**The tourism industry is continuously evolving due to the transformation of consumer values, motivations and behaviours**  
”

For this reason, ETC has embarked on a new 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 will be 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.

# NTO Budgets Survey 2016 report available

The *NTO Budgets Survey* is one of the best examples of the 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. We are grateful for their 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 Ireland - Fáilte Ireland - and the ETC Executive Unit with input from the Marketing Intelligence Committee (MIC) of ETC.

The *NTO Budgets Survey* is a yearly report and serves as a strictly confidential benchmarking tool. It is available upon request for participating ETC members only.

## CALENDAR OF WEBINARS 2017

**25 January**  
**Tourism Economics**  
European Tourism- Trends & Prospects (Q4/2016)

**19 April**  
**Tourism Economics**  
European Tourism- Trends & Prospects (Q1/2017)



## Fostering knowledge sharing:

# ETC / UNWTO round-table discussion on wellness and medical tourism

Held in Budapest, Hungary, the round table *Exploring Health Tourism* was an exceptional occasion that brought together a group of international experts to explore and better understand the growing segment of wellness and medical tourism.

The catalyst for this event was the ETC-UNWTO working paper *Exploring Health Tourism*, the first attempt to set a coherent conceptualisation of health tourism and define the motivations behind travellers pursuing health-related services.

With the support of the Hungarian Tourism Agency, the meeting was convened by the European Travel Commission and the World Tourism Organization (UNWTO), as part of their joint research programme.

This two-day event gathered, among others, experts from the World Health Organization (WHO), the European Union (EU), the World Travel and Tourism Council (WTTTC), the European Spas



↑ Delegates attending the ETC - UNWTO round-table discussion in Budapest, Hungary.

Association, the Global Wellness Institute and Spain Cares, as well as health-related tourism sector representatives from Hungary, Lithuania, Malaysia and Mexico.

Discussions covered the ongoing ETC and UNWTO research on health tourism, a complex and not yet well-defined segment. In addition, participants debated the taxonomy proposed in the research to agree on a consistent terminology to define and describe the system of travelling for health purposes. The round

table also explored the latest trends shaping health tourism and how tourism destinations can tap into these opportunities.

Eduardo Santander, ETC Executive Director, said: "For ETC and UNWTO it is very important that we provide tourism authorities, managers and experts with a better understanding of the health tourism phenomenon and jointly cooperate to identify and provide a consistent terminology that lays the foundations for this promising sector."

## → 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  
 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 
- 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**  
 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, Value Retail, Welcome Chinese

## ETC AGENDA 2017

- 23 January**  
 ETC Marketing Group Meeting at ENTER 2017, Rome, Italy
- 17 February**  
 83rd ETC Board of Directors' Meeting  
 Brussels, Belgium
- 2-4 March**  
 2nd Annual Meeting of the ETC Market Intelligence Group (MIG) and Marketing Group (MKG)  
 Budva, Montenegro
- 28 April**  
 The EU-China Tourism Year 2018: New investment opportunities for the tourism sector in Bulgaria  
 Sofia, Bulgaria
- 17-19 May**  
 93rd ETC General Meeting and 84th ETC Board of Directors' Meeting  
 Porto, Portugal
- 9-10 May**  
 World Bridge Tourism - China  
 Shanghai, China
- 10-12 May**  
 ITB China  
 Shanghai, China

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