As the world’s number one tourist destination, Europe is on a promising growth path in 2015 and the region is expected to record a positive increase in international tourist arrivals for the sixth consecutive year.

Tourism has a crucial role in Europe’s economies. According to WTT, the sector’s direct and indirect contribution represented 9.2% of the total European GDP, supporting more than 35 million jobs in 2014. For the current northern hemisphere peak season – which accounts for more than a third of international tourist arrivals recorded in a year – prospects for European tourism remain optimistic. This is despite apparent shifts in international travel flows influenced by continuing political tensions, struggling economies and fierce competition.

ETC research shows that long-haul markets continue to be an important driver of growth in 2015 with travel sentiment in major source markets remaining upbeat for the peak travel season (May-August 2015). In particular,

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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 33 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, Sweden. 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 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 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 Administration

Miguel GALLEGÓ
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 Zuzana Helikova (King’s College London), Yasemin Volders (University of Antwerp) and Johannes Siter (University of Applied Sciences bfi Vienna).
ETC PARTNERSHIPS

Joint Position on Open Skies by ETC and ACI Europe

On the occasion of the 25th ACI EUROPE Annual Assembly which took place in Prague on 25th June, Arnaud Feist, President of ACI EUROPE and CEO of Brussels Airport, announced the release of a joint position on Open Skies by ETC and ACI EUROPE.

The statement underlines the need to support connectivity by expanding Open Skies beyond Europe. The priority is replicating the benefits achieved by the 2006 EU-US aviation agreement with the EU’s main trading partners - including ASEAN, China, the Gulf countries, India and Turkey. These EU-negotiated agreements should aim at liberalising market access on international air routes for both passenger and freight services.

Eduardo Santander underlined that European tourist destinations are increasingly tapping into the growing middle-classes of emerging markets with the expectation of attracting a growing number of visitors in the future. In this context, air connectivity has acquired a new strategic relevance for the European economy.

The greatest EU connectivity gains have been in the Middle East, reflecting the increased importance of the Gulf States as trading partners for the EU and the role played by the Gulf airlines - especially Emirates, Etihad Airways and Qatar Airways - in the growth of the EU-Middle East aviation market. This performance is also linked to the increasing role played by Gulf airlines in connecting the EU to Asia via their hubs.

Eduardo Santander commented: “Connectivity goes beyond Open Skies. The EU’s new Aviation Strategy should address a range of issues, such as more liberal and tourist-friendly visa policies, enhancing airport capacity, abolishing aviation taxes, reducing regulatory driven costs and implementing the Single European Sky. In the future, the major growth in tourism arrivals will come from the emerging source markets located outside Europe, and a good aviation strategy will be an important prerequisite to keep Europe as the world’s number one tourist destination.”

New Strategic Partnerships and International Relations

Continued from page 1

A week later, on 25th June, Eduardo Santander and Olivier Jankovec, Director General of ACI Europe, committed to pursuing policy alignment between the two organisations and related joint initiatives in the benefit of both parties.

A key focus is increasing the connectivity of European airports and attracting more passengers, with the aim of facilitating international tourism arrivals in Europe. ACI EUROPE and ETC join forces on all issues impacting tourism and air transport, such as passenger facilitation, airport connectivity, airport capacity, intermodality and access to airports, and promoting European destinations.

ACI Europe represents over 450 airports in 45 European countries and its member airports handle over 90% of commercial air traffic in Europe, welcoming more than 1.7 billion passengers, 16.8 million tonnes of freight and 20.8 million aircraft movements each year.

In order to enhance tourism cooperation across the Atlantic, ETC and the European Tourism Association (ETOA) met with Brand USA and the US Travel Association to exchange strategies and visions with the aim of increasing tourism flows in both directions. Since the beginning of this year, the US market reacted positively to the ongoing economic recovery and strong currency, and outbound trips from the US to Europe are expected to increase by around +6% in 2015.
Food Emerges as Europe’s Next Top Gateway Experience

Food represents one of the most competitive advantages of European destinations. Europe’s diverse gastronomy and high-quality food produce is in itself a major tourism attraction.

With the aim of helping to enhance the management quality of the public sector within the gastronomic tourism field, ETC was invited to participate in the 1st UNWTO World Forum on Food Tourism which took place in the Donostia-San Sebastián, Spain, between 27th and 29th April. Miguel Gallego, ETC’s Head of Marketing and Communication, presented the current profile of the foodie traveller visiting Europe from different overseas source markets.

ETC’s research identified that North American travellers interested in history and culture themes also show higher interest in experiencing traditional local cuisine. The US and Canadian consumer speak favourably about the quality, diversity and cultural aspect of food, beer and wine on offer in Europe.

Food occupies a disproportionately large share of Brazilian travellers’ accounts of their trips, not least to Europe. It is especially the traditional food that is of interest, and spending time in restaurants is seen as part of the fun of travelling. Russian travellers equate Europe with excellent cuisine, whether it is immersing themselves in local culture by attending gastronomic festivals or markets or experiencing its variety by sampling regional specialities. Finally, Chinese travellers in Europe like to sample the local cuisine, but beyond that the preference is for Chinese food, especially for breakfast.

All this research led ETC last year to launch the portal TastingEurope.com, the official portal of food and gastronomy tourism in Europe, offering extensive information on food fairs and festivals, traditional local products and a vast range of unique travel experiences related to cuisine and gastronomic traditions in Europe.

ETC will be also presenting the portal TastingEurope.com at the European Food Tourism Week, organised by the European Commission in conjunction with EXPO Milan 2015, between 28th and 30th September.

Eight International Bloggers Explore Europe’s Cultural Routes

An international group of popular professional travel bloggers and photographers explored the European Cultural Route of the Huguenot and Waldensian Trail in July as part of the first Visit Europe Blogger Experience.

Starting in Stuttgart and finishing in Zurich, the group of eight bloggers from USA, Brazil, China, India, Japan, Russia and the UK toured for five days guided by local experts to discover UNESCO World Heritage sites, ancient fortresses and fairy-tale villages while enjoying the nature and traditional local gastronomy, beers and wines. The chronicles of their trips along the cultural route can be followed on VisitEurope.com and in social media with the hashtag #VisitEurope as well as on the platform blog.culture-routes.net and on the individual blogs and social networks of all eight bloggers. In its first two weeks online, the content generated by the travel bloggers reached a potential audience of twenty-two million.

The Visit Europe Blogger Experience was part of the joint activities between the European Commission and ETC to promote thematic and sustainable transnational tourism products to overseas markets. The activity was possible thanks to cooperation from the initiative Crossing Routes–Blogging Europe of the European Institute of Cultural Routes of the Council of Europe, working closely with the local partners of the Cultural Route of the Huguenot and Waldensian trail. There are currently 33 official Cultural Routes in Europe.
ETC OPERATIONS GROUPS

Visit Europe brings the best European Cinema to Canada

The European Travel Commission, through its Operations Group in Canada, is bringing Canadians a selection of the best European cinema during the 11th European Union Film Festival. The Festival will take place from 14th to 28th November in Toronto.

The EU Film Festival has a 10 year-long tradition. It is a unique collaboration of EU Consulates and Cultural Institutes in Toronto striving to reflect the excellence, innovation and diversity of European cinema. Last year’s event showed films from 28 European countries at the Royal Cinema. Most of the films were Canadian premieres.

The EU Film Festival provides the opportunity to build brand awareness of Europe in Canada by showcasing the cultural diversity of its destinations to an audience of potential visitors and advocates. Over two weeks, up to fifteen short videos showcasing different pan-European regions will be screened before each festival film. In addition, promotional material and travel information will be distributed to the festival audience. In one of the most multicultural cities in the world, this unique combination of excellence and openness is well-received among Torontonians.

A majority of ETC member destinations have reported a promising growth from Canada in the first half of the year. Many of these destinations have seen visits and overnight stays grow by double digit figures. Falling world oil prices caused the Canadian dollar to depreciate against its US counterpart, making US holidays less appealing. At the same time, the Canadian dollar appreciated against the Euro, making European destinations more attractive.

New York Rediscover Europe

The ETC Operations Group in the USA, together with Travel+Leisure, hosted a round-table between European destinations and expert traveller advisors with a unique perspective on what is happening in the travel industry today. The event took place in New York City on 9th June. Under the title Europe Rediscovered, the USA Operations Group presented to the audience of 23 travel experts and A-list agents new developments, along with new service launches and marketing initiatives in their destinations.

ETC’s President and the CEO of Visit Flanders, Peter de Wilde, and Eugenio Magnani, Chair of ETC’s USA Operations Group and Director North America of the Italian Government Tourist Board, welcomed the group travel advisors and addressed the audience during an interactive discussion. The aim of the debate was to get advisors’ feedback on the challenges and opportunities for enhancing travel from USA to Europe. The Q&A session was followed by a speed dating session between all OG members and the travel advisors on the most effective strategies in terms of marketing to them and their clients.

The USA remains as the major outbound travel market to Europe. Macro-economic indicators in the USA point to a solid recovery with GDP growth expected to reach +3% in 2015 according to the World Economic Outlook report, in addition to favourable financial conditions, an increase in power spending and business and consumer confidence beside low oil prices. A weaker Euro is supporting an upturn in demand for European destinations pointing at solid growth over the summer months.
Do You Understand the Decision-making Process of Meetings Organisers?

Martin Sirk, CEO of ICCA, addressing the audience during the ETC-UNWTO MCCI Seminar in Antwerp.

As one of the fastest-growing segments in the tourism industry generating millions in revenue, the meetings industry has received increased attention from countries and cities alike. With new destinations making way into this sector, competition for market shares in Europe and worldwide has become fierce. Consequently, an in-depth understanding of the key factors that influence the decisions about where to hold meetings, congresses and conventions has become crucial.

In response to this, ETC, together with UNWTO, commissioned a brand new study to provide an improved understanding of the meetings, congresses, conventions and incentives industry. This study provides an exhaustive segment overview and insights into the decision-making process of meetings organisers. The study also showcases best practice examples from selected National Tourism Organisations (NTOs), public convention bureaus, and city and regional tourist boards. It features relevant examples that allow for deeper understanding of practices and key players within the industry.

To support the launch of this publication, ETC and UNWTO, in collaboration with VisitFlanders, organised an international seminar in Antwerp in June. The event followed a long tradition of sharing knowledge with the wider tourism sector initiated by the ETC Market Intelligence Group and UNWTO’s Tourism Market Trends Programme. The ETC-UNWTO International Seminar was aimed at helping tourism professionals take full advantage of the opportunities provided by the meetings, congresses, conventions and incentives industry. The seminar was supported by the participation of keynote speakers Martin Sirk, CEO of ICCA (International Congress and Convention Association), Tom Hulton, Director of International Relations at IMEX, and Bruce Redor from Gaining Edge, the consultant responsible for the preparation of this latest piece of ETC research.

ETC’s Participation in Industry Events

ETC was invited to speak and make a presentation at the 20th Annual European Spas Association (ESPA) Congress, in Sopot, Poland. This marks a continuous collaboration between ESPA and ETC. The European Spas Association is an umbrella organisation representing 20 members from 19 European countries. Its main objective is to promote spas and balneology in Europe, and to provide access to these natural resources and remedies.

The 20th Annual ESPA Congress focussed on themes such as the Agenda Europe 2020 discussion of opportunities for European Health & Spa resorts, insights into trends, and innovation of spa destinations in terms of product development and services, marketing, sales and quality. In addition, discussions during the congress looked ahead into the future of the industry towards 2025.

ETC representative, Jennifer Iduh, provided research insight into product development in the sector. Her presentation focussed on tourism products for destination marketing and disclosed key elements to success. She also discussed tourism product development challenges spanning from political, economic, technological and socio-cultural factors as well as the opportunities offered by the industry. Lastly, Ms Iduh underlined the importance of collaboration and

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1 WTTC (2015)
2 ETC, ETOA, & Eurail Group G.I.E. (2015), Long-Haul Travel Sentiment Survey & Index
Understanding consumers is an essential component of the intelligence activities of every business and more so in the dynamic tourism sector where the consumption of goods and services is instrumental in living an experience. ETC has an established track-record of gathering frontline market intelligence on key long-haul travel markets that unveil travellers’ preferences and behaviour when visiting Destination Europe.

In today’s volatile tourism climate, the sector is confronted with constantly changing consumer behaviour. The speed of change, the blurring of traditional geographic boundaries, the growing power of the consumer and the nature of globalisation are all calling for a forward thinking approach and fact-finding endeavour to uncover the long-term behavioural and attitudinal trends that ultimately shape and impact travel preferences.

Focusing on lifestyle trends, ETC has recently commissioned a study to take stock of the kaleidoscope of trends going beyond an analysis of macro-trends influencing consumers’ purchasing behaviour. The study will identify and examine lifestyle trends from a global and market-specific perspective and to subsequently provide a meaningful overview that is relevant for the European tourism sector. The ETC Study on Consumer Trends & Tourism also aims to provide sufficient understanding of the opportunities that can be exploited by tourist destinations. In addition, it seeks to provide strategic and tactical recommendations and insights which can be used practically by European National Tourism Organisations or National Tourism Authorities and Destination Management Organisations. A portfolio of case studies will provide further insights on the select trends that impact on the European tourism sector.

Improving Access to European Tourism Statistics

TourMIS is a marketing decision support system that helps the tourism industry by collecting, storing, processing and disseminating tourism-related information. It provides access to tourism indicators on European tourism.

These indicators include bed nights, arrivals and accommodation capacities in tourism destinations, such as countries, regions and cities (www.tourmis.info). With the support of ETC, TourMIS is constantly undergoing improvements to include more sophisticated and useful tools for both tourism professionals and users in general.

To further support the effort, ETC, together with MODUL University, is committed to constantly improving the tool’s usability. A new manual provides detailed guidance and information on how to enter tourism statistics into TourMIS and basic information on how to retrieve data from the database. The manual can be downloaded from ETC’s website - www/etc-corporate.org

Uncovering the Travel Preferences of Tomorrow’s Consumer

To further support the effort, ETC, together with MODUL University, is committed to constantly improving the tool’s usability. A new manual provides detailed guidance and information on how to enter tourism statistics into TourMIS and basic information on how to retrieve data from the database. The manual can be downloaded from ETC’s website - www/etc-corporate.org

Calendar of Webinars 2015

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<td>Tourism Economics</td>
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<td>European Tourism – Trends &amp; Prospects (Quarterly Reports)</td>
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ETC MEMBER ORGANISATIONS

- Austria
  Austrian National Tourist Office (ANTO)

- Belgium
  Flanders: Visit Flanders
  Wallonia: Walloon-Bruxelles Tourism (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
  Visit Finland - Finpro ry

- Germany
  German National Tourist Board (GNTB)

- Greece
  Greek National Tourism Organisation (GNTO)

- Hungary
  Hungarian Tourism Plc.

- 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 National Tourist Office (ONT)

- 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
  Spirit Slovenia, Slovenian Tourist Board

- Spain
  Turespaña - Instituto de Turismo

- Sweden
  VisitSweden

- Switzerland
  Switzerland Tourism

- Turkey
  Ministry of Culture and Tourism

ETC AGENDA 2015

- 11th TourMIS Users’ Workshop & International Seminar on Monitoring Sustainability: International Seminar on Environmental and Social Tourism Indicators for Measuring Tourism Development
  MODUL University Vienna, Austria on 10th - 11th September

- 1st ETC Marketing Group Meeting
  Brussels, Belgium on 21st - 22nd September

- 90th ETC General Meeting and 78th ETC Board of Directors’ Meeting
  Belgrade, Serbia on 7th - 9th October

- Destination Europe Summit 2015
  London, United Kingdom on 29th October

- The Impact of improved VISA regulations on European tourism
  WTM London on 3rd November

- Festuris Tourism Trade Show
  Gramado, Brazil on 5th - 8th November

- Digital Tourism Innovation Campus 2015
  Barcelona on 19th - 20th November

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