



ETC BULLETIN

News from the European Travel Commission

Winter 2015-2016

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Marketing Directors United for Destination Europe



Members of the ETC Marketing Group at the meeting in Brussels.

The very first meeting of the new ETC Marketing Group (MKG) took place in Brussels on the 21st and 22nd September 2015. The event gathered together marketing directors of 17 National Tourism Organisation members of the ETC as well as representatives from the European Commission, ETC partners and marketing experts. Elke Dens, Marketing Director of VisitFlanders, was appointed Chair of the MKG. Marketa Chaloupkova

(Czech Tourism) and Angela Barela (GNT0) were appointed Vice-Chairwomen of the group of marketing experts.

The event offered ETC members a unique opportunity to shape the marketing strategy and development of their organisations.

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ETC Continues Cooperation with the European Commission

Building upon the partnership started in 2012, ETC and the European Commission signed a new cooperation agreement covering a programme of activities to be developed in 2016. The new contract continues the *Destination Europe 2020* initiative, designed to promote Europe as a tourist destination and strengthen its competitive image in overseas markets.

The first stage of the joint programme of activities (2012-2014) defined a long-term strategy for 'Destination Europe' and was based on research and consultations with the tourism industry. It was followed by the development of appropriate communication channels, tools and processes to reach out to target segments throughout 2014.

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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 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 Administration



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 intern is Lyublena Dimova (UCF Rosen College / ISCTE University Lisbon).

ETC PARTNERSHIPS



Representatives of the signing parties and of the EU institutions at the presentation of the Tourism for Growth and Jobs Manifesto.

ETC Supports the Tourism for Growth and Jobs Manifesto

For the first time ever, 24 European public and private tourism stakeholders, including the European Travel Commission (ETC), have united and, with a common voice, launched their Tourism for Growth and Jobs Manifesto on the occasion of the European Tourism Day held on 16th December 2015.

Following extensive consultations, stakeholders representing the travel agents and tour operators, air, rail and ground transportation, accommodation, local travel operators, restaurants, bars, cafés, shopping centres, attractions, tourist sites and many others identified the challenges faced by the sector nowadays and formulated concrete actions to tackle these challenges in the coming years. The actions are listed in the Manifesto document under eight priority areas: competitiveness, digitalisation, good governance, joint promotion, reduce seasonality, skills and qualification, sustainability and transport connectivity.

The European travel and tourism sector stakeholders came together to call the European institutions to act on these key priorities, which seek to ensure that the continent remains an attractive destination and that the tourism sector continues to make a significant contribution to growth and job creation in



the European economy. In order to formulate effective tourism policies, a holistic European approach is needed, taking into account the multiple impacts of the sector as well as the wide spectrum of stakeholders involved in or affected by tourism.

The document was presented to representatives of the European institutions at a reception hosted by the Confcommercio Delegation in Brussels the week before European Tourism Day. The event was attended by Members of the European Parliament (MEPs) Isabella

De Monte (S&D), Cláudia Monteiro De Aguiar (EPP), Ana-Claudia Tapardel (S&D) and István Ujhelyi (S&D) who expressed their support for the initiative. Speaking on behalf of the European Parliament, as Vice-Chair of the TRAN Committee and President of the Tourism Task Force, Mr Ujhelyi said: "It is a historical moment from the point of view of the European representatives of the tourism sector. This is why we supported this initiative and encouraged politicians and the tourism stakeholders to sit on the same side of the table. Together, we can convince the institutions here in Brussels, through concrete actions and diplomacy."

The event was also attended by the representatives of the European Commission, Jakub Cebula, Member of the Cabinet of EU Commissioner for Internal Market, Industry, Entrepreneurship and SMEs, Elzbieta Bienkowska; and Carlo Corazza, Head of the Tourism, Emerging and Creative Industries Unit, DG Growth. They were receptive to the initiative, saying that the European Commission will work together with all stakeholders closely in order to try to give appropriate answers to the challenges set out in the Manifesto.

The full Manifesto is available for download at www.tourismmanifesto.eu

ETC PARTNERSHIPS

ETC Calls for a Visa Reform that Would Create €114 Billion Extra Revenue and 615,000 New Jobs

In view of the ongoing debate in the European Parliament regarding the Schengen visa code, the European Travel Commission has called for a reform of the way visas are granted to leisure and business travellers. The aim would be to attract an extra €114 billion in export revenue and create 615,000 new jobs in Europe by 2020.

Earlier in 2015, ETC commissioned Tourism Economics to undertake an analysis of the impact for continental Europe of different degrees of liberalisation (benchmarked against no reform) for 10 priority source markets which together account for more than half (53%) of the visa-constrained visits to European destinations.

According to the study, adopting 'best practice' policies for the ten profiled markets would generate 3.4 million additional arrivals to European destinations each year by 2020. This would involve a cumulative total of €18.3 billion in associated tourism spending over the period to 2020 and 95,000 new jobs.

Offering new visa types, such as an eVisa or visa on arrival, would further reduce the burden on travellers and would help fuel stronger economic growth in



Round table discussion on the visa package in the European Parliament in Brussels. © European Union 2015 - Source: EP.

subsequent years. The impact would be 8.5 million more annual visitor arrivals, a cumulative total of €45 billion in additional spending and more than 200,000 additional jobs over the period. The largest benefits would flow from a complete visa waiver for these markets, in which case 21.8 million additional

arrivals per year would be expected. Over the period to 2020, this would generate €114 billion in new export revenue and 615,000 additional jobs, including direct, indirect and induced employment.

At a press conference at the World Travel Market in London, Mark Henry, Vice-President and Coordinator of ETC's visa advocacy work, presented a range of practical initiatives to deliver improved openness in ways that avoid compromising security or immigration control. A week later, ETC's recommendations for action were also presented to Members of the European Parliament at a roundtable discussion.

The World Travel & Tourism Council (WTTTC), joined with ETC to encourage governments to proactively embrace visa facilitation. Helen Marano, Vice-President Government and Industry Affairs, WTTTC, said that: "Visa facilitation is central to stimulating economic growth and job creation through tourism in Europe and worldwide".



Press conference at the World Travel Market in London. From left to right: Helen Marano (WTTTC), David Goodger (Tourism Economics), Mark Henry (ETC Vice-President) and Peter De Wilde (ETC President).

“If we are interested in growing our share of global tourism and capturing the substantial economic benefits, there is only one correct path to follow – that of increased openness.” Mark Henry, ETC Vice-President

ETC PARTNERSHIPS

ETC Opens to the Private Industry

One of the oldest tourism organisations - the European Travel Commission - was created in 1948 to advocate the importance of tourism as an engine for the European economy. In the last decades, ETC has positioned itself at the forefront of the European tourism scene. Following on its mission to strengthen the sustainable development of Europe as a tourist destination, ETC recently opened its membership to private organisations and academia.

The ETC Associate Membership programme focusses on public relations and advocacy, while granting access to cooperation in marketing and research activities on an ad-hoc basis. The ETC General Meeting #90, held in Belgrade on 8th October, approved applications from the first four associate members of ETC.

A warm welcome to Expedia, Amadeus, Global Blue and Emirates as they join the oldest European tourism association!



Expedia

Expedia, Inc. is one of the world's leading travel companies, with an extensive brand portfolio that includes some of the world's most trusted online travel brands. Expedia empowers business and leisure travellers through technology with the tools and information they need to efficiently research, plan, book and experience travel. In addition, through its advertising and media businesses Expedia helps businesses and, among others, tourism authorities reach a large audience of travellers around the globe. Expedia, Inc.'s companies operate more than 100 branded points of sale in more than 60 countries.

Emirates

Established in October 1985, Emirates has become one of the fastest growing and innovative international network carriers in the world. Emirates now operate a fleet of over 230 Airbus and Boeing aircraft currently serving 148 destinations in 80 countries. The airline is the world's



number one international carrier by Revenue Passenger Kilometres (RPKs). In 2014-15, Emirates carried 49.3 million passengers, up 11% on the previous year, with an average seat load factor of 79.6%. The airline employs over 56,000 employees worldwide. Emirates' operations, including the impact of the 220 unique connections it offers, supported 85,100 jobs across the EU in 2013-14, equivalent to €6.8 billion GDP of the total EU GDP.



Global Blue

Global Blue

Global Blue is the world's leader in providing tax refunds to international travellers and global shoppers. Having invented the concept of Tax Free Shopping 35 years ago, Global Blue allows travellers to save up to 19% on the world's best loved brands when shopping abroad. The Global Blue Group has operations in 43 countries around the world, catering to over 35 million transactions annually in a network of 270,000 international merchants, including major luxury brands, department stores, high-street retailers, hotels, supermarkets and smaller independent brands. As a natural part of their business, Global Blue also has strong and established long-term relationships with tourism, customs and tax authorities around the world.

amadeus

Amadeus

Amadeus is a leading provider of advanced technology solutions for the global tourism and travel industry. In the last ten years, Amadeus has invested €3.5bn in R&D in technology for travel and tourism. Amadeus connects travel providers (airlines, railways, rental car, hotels, tour operators, ferries) with more than 90,000 travel agencies worldwide, processing more than 500 million bookings per year. Amadeus has its headquarters in Spain, France and Germany. Amadeus is actively engaged with the European Parliament, the European Commission and tourism industry stakeholders to reinforce the sustainability of the tourism sector.

ETC Continues Cooperation with the European Commission

Continued from page 1



ETC's Executive Director, Eduardo Santander, and ETC's Head of Finance and Administration, Teodora Marinska, signing the new contract agreement with the European Commission.

The third stage (2015) of the initiative utilised the channels and tools developed in the second phase to market and promote Europe in source markets through a new approach, both inspirational and practical and placing particular focus on pan-European themes and experiences.

The 2016 action aims to increase flows of visitors to European destinations through cooperation with key players from the private tourism industry. The activities included a focus on fostering the image of Europe as a unique destination through the promotion of pan-European routes, themes and experiences by means of a pilot joint public-private marketing campaign. This campaign will be rolled out on different digital marketing platforms under a common visual identity for 'Destination Europe'. This pilot project will also serve to elaborate a public-private marketing model. This will set a best practice example of how funds for the promotion of Europe can be leveraged from relevant private industry stakeholders through a marketing matching programme.

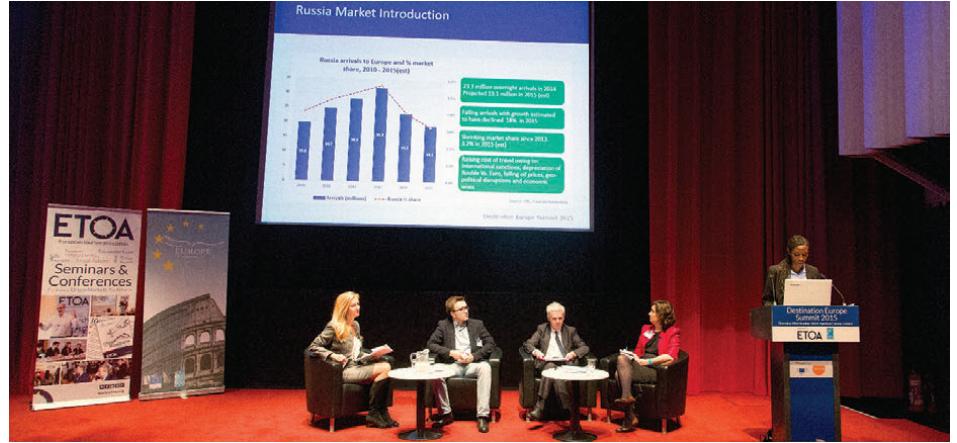
MARKETING ACTIVITIES

ETC and ETOA Conference on Destination Europe

It is widely said that Europe is the world's number one tourist destination but it is open to question if this assertion disguises complacency. How do private sector operators working in third countries think Europe is performing? How important is it for countries to sell themselves as part of a 'Destination Europe package'? What can be done about the tax and regulatory problems that make Europe difficult to sell?

To answer all these questions, ETC and ETOA, the Association for European Inbound Tourism, with the support of the European Commission, hosted a joint conference on how Europe is performing as a destination. The *Destination Europe Summit 2015* took place at the Barbican Centre in London on October 29th.

Chaired by Professor Tony Travers of the London School of Economics, the Summit



Panel discussion on the origin market Russia.

featured a presentation by the European Commission on its tourism policy priorities, a talk by Gideon Rachman of the UK's Financial Times on how Europe is perceived by the rest of the world and a

series of panel discussions on three source markets - the USA, China and Russia, including leading operators from those markets. Original research was also released on the day featuring which

Building a Digital Content Marketing Strategy for Destination Europe

ETC has always made use of digital marketing as the most cost-effective technique to reach out and engage with potential travellers in long-haul markets. From social media to e-mail marketing, ETC uses a broad portfolio of digital platforms to build an online community that enables European destinations to connect and build relationships with potential travellers by providing them with the right information in the right format at the right place and at the right time.

ETC's key online marketing tool is the **VisitEurope.com** portal. For those with a

boundless desire to travel, **VisitEurope.com** is a trusted source of information that inspires truly unforgettable and authentic journeys that create a lifelong passion for exploring more of the continent. European destinations offer travellers centuries of history, a magnificent cultural heritage, a diverse range of cultures, famous attractions and glamorous cities, scenic landscapes, a sense of a unique way of life, a rich gastronomy and hospitality services of high quality standards. ETC has identified 12 pan-European themes as the main drivers of destination choice to

Europe and, together with all its members and partners, focusses content development for **VisitEurope.com** around these themes.

Knowing and understanding who the potential visitors to Europe are is also imperative to maximise the effectiveness and advertising return on investment of content marketing. ETC works constantly in identifying demographics, habits, interests and needs of potential travellers to European destinations in order to provide the content and information that they need across the different stages of the online travel cycle and successfully deliver Europe's brand promise.

ETC presented its content marketing strategy at the UNWTO Regional Conference and Executive Training Workshop on eMarketing in Tourism in Qatar on 13th December. Organised by the UNWTO Themis Foundation and Qatar Tourism Authority, the workshop provided participants with knowledge, skills, tools and a forum for discussion about current key issues and practices in online marketing.



ETC's Head of Marketing, Miguel Gallego, at UNWTO Regional Conference on eMarketing.

destinations in Europe are doing well, which origin markets are showing the most promise and why. Eduardo Santander, CEO of ETC, said: "With the growth of tourists visiting multiple countries, the joint promotion of Europe is more important than ever. And the best way we can boost numbers and jobs is by working with the private sector to understand what our potential customers want. This is a process in which this conference is a new initiative."

"For most of our customers, Europe is regarded as a unitary destination. In America, for instance, they have always talked about a 'European Vacation'. We need to look at ourselves as our customers do, and see what virtues and faults are there that they recognise", said Tom Jenkins, CEO of ETOA.

You can view the recording of the event and download market presentations on www.etc-corporate.com/events

Marketing Directors United for Destination Europe

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In addition to sharing insights and best practices in destination marketing, participants learned about practical solutions through presentations of successful case study examples by top-level experts in branding and benchmarking.

This first meeting of the ETC Marketing Group also served to discuss leadership and to set the goals and priorities that will lay the foundation of Europe's marketing and promotional activities over the coming year.

ETC OPERATIONS GROUPS

The China Operations Group



František Reismüller, Chair of ETC's China Operations Group

František Reismüller Appointed Chairman of ETC's China Operations Group

František Reismüller, Regional Director of CzechTourism China and Director of CzechTourism China - Shanghai office, has been appointed as new Chairman of ETC's Operations Group in China. The appointment was announced last October during ETC's 90th General Assembly in Belgrade (Serbia).

Mr Reismüller has a broad experience in working with Chinese travel agencies as well as in translation, interpretation and journalism. He graduated in sinology at the Charles University in Prague where he is still pursuing his research in the field of Chinese avant-garde literature.

As the China OG's new Chair, Mr Reismüller takes on a significant responsibility due to the increasing relevance for Europe of the Chinese travel market. Since 2012, China has consolidated its status as the world's biggest spender on tourism products and services. Chinese tourists spent €124.1 billion on international tourism in 2014¹, an increase of one-fifth on the previous year. The total number of international arrivals from China to

Europe is expected to have reached 10.9 million in 2015, representing 14% of all Chinese international arrivals worldwide². Despite the signs of a slowdown in China's outstanding economic growth, the prospects for Chinese travel are still fundamentally positive. The long-term forecast remains positive as outbound departures to Europe are expected to sustain this rate, growing an average of 4.8% per annum in the period 2015 to 2020³. At this rate of growth, by 2020, Chinese arrivals could be more than one-fourth higher than current levels.

Destinations are making substantial marketing investments in attracting Chinese visitors. With the profile of Chinese visitors skewing more heavily towards leisure travel, competition for European destinations from other long-haul destinations is intense.

¹ UN World Tourism Organization (UNWTO). UNWTO World Tourism Barometer. December 2015

² European Tourism 2015 - Trends and Prospects (Q2/2015)

³ European Travel Commission (ETC). ETC Dashboard, data from Tourism Economics 2015

ETC OPERATIONS GROUPS

The Brazil Operations Group

Europe Inspires Brazilian Travel Trade, Consumers and Media

European destinations were in the Brazilian travel market spotlight during the last quarter of the year thanks to the intensive promotional activities carried out by ETC's Brazil Operations Group (OG).

Between the 5th and 8th November, the Brazil OG participated in the 27th edition of *FESTURIS-Festival do Turismo de Gramado*, the most important travel trade exhibition in South Brazil, which this year welcomed more than 14,000 trade visitors. Brazil OG members exhibited in a 32m² stand and hosted representatives from Belgium, Denmark, Germany, Monaco, Norway, Spain and Switzerland.

The Brazil OG organised a reception for local tour operators and travel agents at *FESTURIS* during which it presented a new online consumer campaign - *Inspire-se agora!* - aimed at increasing knowledge and awareness of European destinations among Brazilian travellers. The interactive campaign website has been built with contributions from real travellers sharing their European experiences to inspire and help new potential visitors to plan their European itinerary.

The award recognises the outstanding work of Brazilian journalists, photographers and travel bloggers in communicating the diversity of European travel experiences throughout the year.



Members of the Brazil Operations Group present their destinations at the roadshow in Salvador.

Later in November, members of the Brazil OG participated in the roadshow *Experiencia Braztoa*, organised by the Brazilian Tour Operators Association. Based on an around-the-world concept, the roadshow visited Salvador, Porto Alegre and Rio de Janeiro and provided local tour operators and travel agents with unique capacity building and networking opportunities with European destinations. The roadshow welcomed more than 250 buyers and trade professional especially selected by BRAZTOA to attend the events in each host city.

The Brazil OG also announced the winners of the 26th edition of its renowned *Journalism Prize* at a ceremony in São Paulo. The award recognises the outstanding work of Brazilian journalists, photographers and travel bloggers in communicating the diversity of European travel experiences throughout the year. In addition, the winners in the eight award categories took part in a press trip to Germany and Austria in December, during which time they had a unique opportunity to get to improve their knowledge of the traditional European Christmas markets.



Winners of the Journalism Award 2015. Photo: Felipe Mairowski.

RESEARCH ACTIVITIES

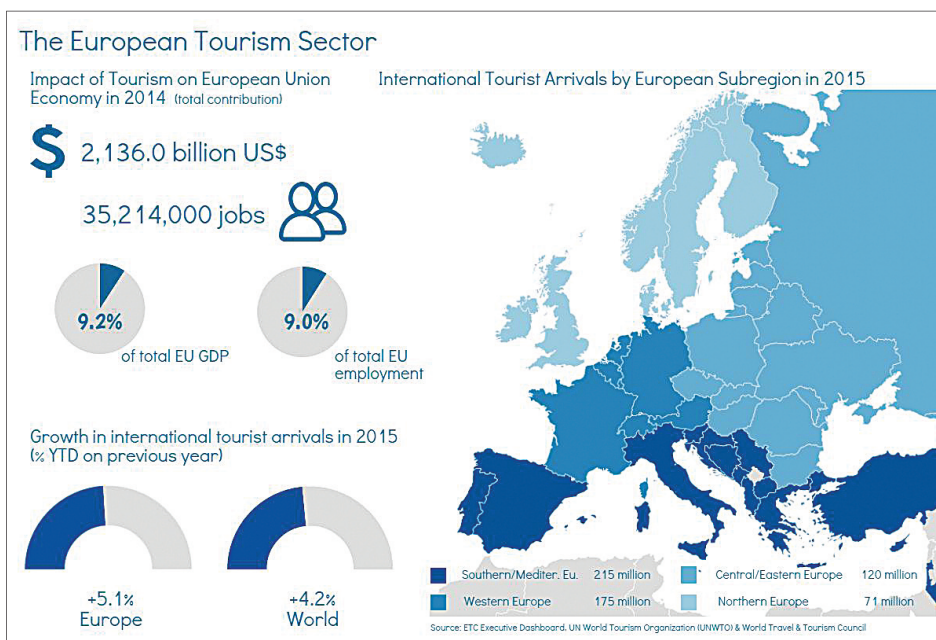
Monitoring European Tourism Performance 2015 and Outlook 2016

Destinations in Europe can justifiably look back over the past year and celebrate the tourism sector's outstanding performance.

2015 marked a year of healthy growth for European tourism, consolidating the firm increases recorded over the past six years and promoting tourism as one of the best performing sectors and key generator of income and employment. Despite strong headwinds caused by socio-economic agitations, fluctuating exchange rates and security concerns, most recent estimates by the UN World Tourism Organization reveal that international tourist arrivals to Europe grew by 5.1% last year.

This growth in arrivals to European destinations was, in particular, supported by solid intra-regional demand boosted by the recovery of many euro area economies: visits from Germany and France mirrored the increase in consumer consumption and improved consumer confidence, UK citizens benefited from the strength of the pound against the euro.

Among long-haul markets, the United States and China confirmed their positions as robust generators of travel to Europe. With favourable exchange rates boosting the affordability of a European



holiday, visitor arrivals from the United States are expected to have increased by +11% this year. Likewise, travel from China to Europe continued at its double-digit pace, accumulating to some 10.9 million arrivals in 2015, up +30% from 2014. Together, both intra- and extra-European source markets offset the steady decline in Russian tourism demand, hurt by a weak economy struggling with dwindling oil prices and shrinking wages.

However, European destinations should not remain idle in this booming environment but persist in fostering tourism and encouraging visitors from established and emerging source markets to experience the region. Success will be achieved by capitalising on Europe's potential to inspire and cater to different markets and travel segments and as well as by eliminating travel barriers in collaboration with public and private stakeholders.

Exploring Transnational Tourism Themes and Routes

In the past decades, the development of thematic tourism initiatives has grown worldwide and gained importance. In particular, tourism routes emerged with the key aim of bundling tourist attractions under a unifying theme for promotion purposes and to attract visitors to remote tourist locations.

In contrast, tourism themes bring together a destination's tangible and intangible features and are designed to cater to specific visitor segments pursuing unique experiences on topics such as culture, history, heritage, nature, sports, gastronomy, religion or health. From a transnational perspective, themed tourism products enhance synergies, strengthen cross-border collaboration and offer visitors an immersive experience through

the kaleidoscopic offer that's available across different countries in Europe and in other regions around the world.

The European Travel Commission (ETC) and the World Tourism Organization (UNWTO) are currently engaging in thoroughly investigating the landscape of transnational tourism themes and worldwide routes in a new handbook. Aimed at supporting the work of National Tourism Organisations, the handbook will be first and foremost focussed on providing members and professionals in the field with a thorough understanding of the landscape of tourism themes and routes and providing practical guidance in order to market and promote destinations through thematic tourism experiences and products.



RESEARCH ACTIVITIES

Exploring the Digital Appeal of European Destinations

In order to improve its services for members, ETC is continuously seeking to expand its knowledge by exploring new methodologies and information sources for the benefit of its members.

In 2015, ETC explored the appeal of European destinations in the online sphere. As the majority of leisure travellers begin searching online before they decide how or where to travel it has become paramount for destinations to understand visitors' expressed interests online. Taking advantage of insights that large compilations of data can reveal, the report derives tourists' online behaviour and decision-making process when selecting a destination. At its core, it comprehensively benchmarks European destinations and their competition according to their online demand, or appeal, overall and across 40 selected experiences and target groups.



As in the physical world, 'Destination Europe' also ranks 1st in the online world, attracting one third of searches. Leading destinations are found in Southern and Mediterranean and Northern Europe. However, search data indicates that

Europe's competitors are catching up, attributed to the higher number of searches per actual international arrival.

The report is available for ETC members only.

Now available: New ETC – UNWTO Study on the Decision-making Process of MCCI Organisers

ETC's portfolio of research material is on the rise with new reports and studies widening its online library. ETC recently launched the *ETC - UNWTO Study on the Decision-making Process of Meetings, Congresses, Conventions and Incentives (MCCI) Organisers*, another practical tool the organisation provided to its members at the end of 2015.

This comprehensive study, aimed at Destination Management Organisations (DMOs) and National Tourism Organisations / Associations (NTOs / NTAs), provides a wide-ranging overview of the meetings, conferences, congresses and incentives segments and an in-depth analysis of the factors concerning meeting planners' decision-making process with respect to destination and venue selection. This study also offers the reader a compilation of successful MCCI destinations case studies and the best responses to address challenges and make the most of the opportunities provided by this growing sector.

The meetings industry continues to thrive and is an essential segment experiencing fast growth within the tourism sector. Business tourism remains one of the main purposes of travel worldwide providing countless social and economic benefits; it

is a significant element for future growth of the global economy, an essential element of knowledge-sharing and knowledge-gathering and a powerful element for fostering a better understanding and relations amongst different regions and cultures.

This industry has received increased attention from countries and cities and it is expected to continue growing in the coming years. Tourism destinations, particularly the emerging ones, are considerably and successfully investing in the development of venues, transportation and accommodation infrastructures, and facilities with the main purpose of attracting business events. In this framework, it becomes fundamental for tourism professionals to achieve an in-depth understanding of this growing sector and its segments.



US Travel Market: New Approach to Disseminate Market Facts and Figures

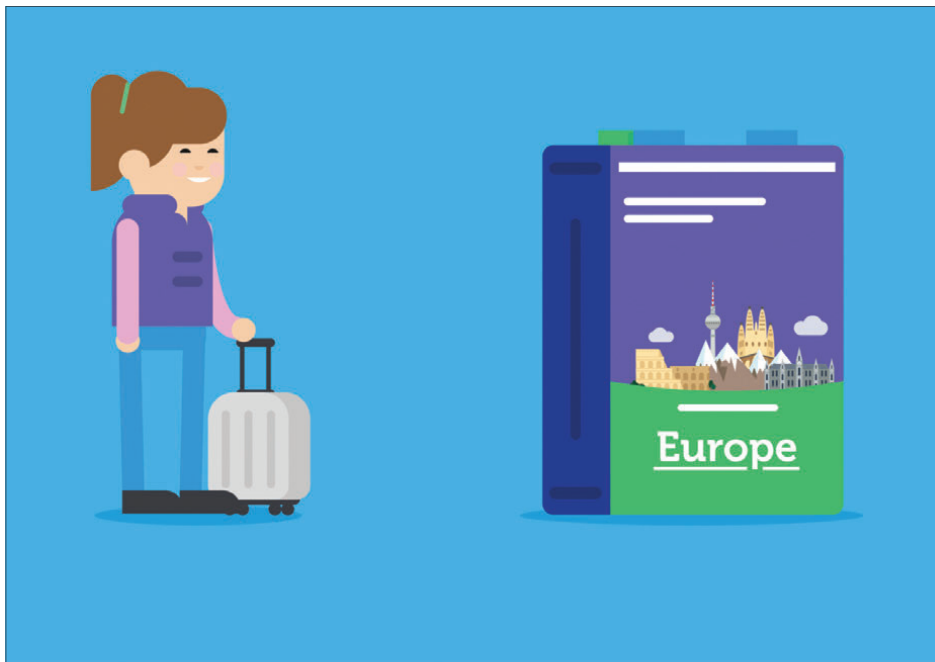
The European Travel Commission is looking into new tools for content dissemination to provide its members and the general public with easy and immediate access to the wealth of information, statistics and material the organisation collects.

As an initial step, ETC commissioned the production of a pilot video - motion infographic - that features relevant insights on Europe's largest source market, the United States of America.

The pilot video, which is now available on ETC's website, provides key figures for the US travel market such as US arrivals to Europe, growth rate, share, 2020 prospects and also outlines the US travellers' profile. In future, ETC intends to

continue engaging in dissemination activities of this kind in order to provide an overview of some publications and reports.

Why the US market? A weaker Euro is posing an upturn in demand for long-haul travel from the USA to Europe. In addition, strong macroeconomic indicators suggest a positive recovery in the US in the coming year as the country shows signs of a solid rebound supported by a stronger US dollar, higher disposable income and an increase in power spending and business and consumer confidence. Furthermore, future prospects for this market remain optimistic with US arrivals to Europe expected to increase in the coming years. To watch the video, please visit www.etc-corporate.org



... Planning a trip to Europe this year.

Calendar of Webinars 2016

27 January	Tourism Economics	European Tourism – Trends & Prospects (Quarterly Report)
April	Tourism Economics	European Tourism – Trends & Prospects (Quarterly Report)



Targeted Decision-making Through Collaborative Benchmarking

Collaboration is one of the core values of the European Travel Commission. This is actively achieved through activities designed to achieve added value for Europe's diverse destinations.

A role model of this organisational motive is the annual *NTO Budgets Survey*, a project showcasing the willingness of organisations to share sensitive budgetary and structural information in order to improve strategic decision-making by fostering knowledge.

The NTO Budgets Survey benchmarks member NTOs on organisational aspects and budget allocation. In 2015, 30 ETC members contributed to the study. The study has been made possible as a result of the excellent work that has been done by Fáilte Ireland and members of staff in the participating NTOs. ETC is grateful for their input and would like to thank them for the time they have invested to make this research possible.

The NTO Budgets Survey is a yearly report and serves as a strictly confidential benchmarking tool.

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**
Czech Tourism 
- **Denmark**
VisitDenmark 
- **Estonia**
Estonian Tourist Board - Enterprise Estonia 
- **Finland**
Visit Finland - Finpro 
- **Germany**
German National Tourist Board (GNTB) 
- **Greece**
Greek National Tourism Organisation (GNTO) 
- **Hungary**
Hungarian Tourism Ltd. 
- **Iceland**
Icelandic Tourist Board 
- **Ireland**
Fáilte Ireland Tourism Ireland Ltd. 
- **Italy**
The Italian Government Tourism Board 
- **Latvia**
Latvian Tourism Development Agency (TAVA) 
- **Lithuania**
Lithuanian State Department of Tourism 
- **Luxembourg**
Luxembourg for Tourism 
- **Malta**
Malta Tourism Authority (MTA) 
www.visitMALTA.com
- **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 

ETC AGENDA 2016

- 79th **ETC Board of Directors' Meeting**
Brussels, Belgium, on 27th January
- 2nd **ETC Marketing Group Meeting** and 30th **Annual Meeting of the ETC Market Intelligence Group**
Prague, Czech Republic, on 17th -19th February
- 91st **ETC General Meeting** and 80th **ETC Board of Directors' Meeting**
Agia Napa / Protaras, Cyprus, on 11th-12th May

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