Making progress, moving forward: An update on ETC reform

The European Travel Commission (ETC) was established in 1948 to promote the importance of tourism in reviving Europe’s economy after World War II.

Today, tourism is still playing a crucial role as an engine for the European economy. Last year, the tourism sector’s total contribution represented 8.2% of the European GDP, generating a total of 30 million jobs or 8% of total employment.

Since its foundation over 66 years ago, ETC’s core task has remained the same and is still very relevant in a modern Europe:

“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.”

It is widely acknowledged that Europe is the world’s number 1 tourist destination. With 563 million international tourist arrivals in 2013, Europe holds a market share of 52%. But it is also worth noting that long-haul markets in particular contributed significantly to the growth of inbound European tourism.

However, the European tourism industry is facing growing global competition from emerging destinations that are attracting increasing numbers of tourists. As a result of fast developing economies outside of Europe, traditional world tourism patterns are beginning to change.

ETC must respond to these shifting patterns and capitalise on the potential of tomorrow’s outbound travel markets, especially those from emerging economies whose expanding middle classes are a growing market for European destinations.

At the core of ETC’s reform and new strategy are two themes - the stimulation of competitiveness and the promotion of sustainable growth within the European tourism sector by raising awareness for Destination Europe in long-haul markets through extensive market research and targeted marketing action. Cont. on page 7
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 e-Marketing Network (eMN). The MIG commissions and produces studies, handbooks on methodologies and best practice, and facilitates the exchange of European tourism statistics. The eMN provides information and expertise about the use of digital media by NTOs and produces the ETC Digital Portal.

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 chairman. 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 public relations. 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 Enterprise), the Organisation for Economic Co-operation & Development (OECD) and the European Tour Operators’ Association (ETOA).

Who is Who at ETC?
Daniela Buzova started mid-August as Marketing Trainee and Zuzana Helikova starts on September 1st as the new Trainee Research & Development.
EuroShorts – the Sequel

After last year’s very successful VisitEurope short film campaign, ETC and the European Commission have now launched a sequel… My EuroShorts - 2014 edition. This time, no professional experience of filmmaking is needed – anyone can have a go at recording their experiences of travelling around Europe.

Working in partnership with the creative development agency, Screen South, we’ll be looking for short but exciting travel films that reflect a personal journey and show a unique, interesting or fun experience.

Films must show travel across at least three European countries and must last no longer than five minutes. Judges will be looking for a film that creates an emotional or humorous response and that inspires travel to Europe.

After the first stage deadline of 1st October 2014, a long-list of the best applicants will be posted on VisitEurope’s social media sites so that members of the public can vote for their top three.

The winning filmmakers will be rewarded with a holiday for two in Europe, including flights and accommodation for two weeks. They’ll also receive first-class rail passes to help them explore the rest of Europe in style.

The best video footage will be used to make a compilation video to inspire other travellers to explore Destination Europe.

Visit www.euroshorts-films.com for more information.

eM N Summer Bar Camp 2014

ETC’s e-Marketing Network (eMN) held its first-ever Summer Bar Camp in June. The event took place at the Communications Museum in Frankfurt, Germany, and was organised with support from the German National Tourism Organisation and the Digital Tourism Think Tank.

The one-day Bar Camp - exclusively for ETC members - provided participants with some great insights into key areas of digital development such as content, social, mobile and big data.

A group of experts, including travel blogger Melvin Böcher, social media guru Joantxo Llantada and mobile marketing master Zornitza Yovcheva, led each session, providing practical advice, input and recommendations. The presentations and follow-on discussions gave eMN members plenty of opportunities to network and share experiences and best practice.

All eMN members attending the Bar Camp were presented with a copy of the ETC and UNWTO Handbook on E-marketing for Tourism Destinations, which has now been fully integrated into the ETC Digital Portal. All of the chapters can be downloaded and read offline, along with the extensive digital trends data and market information that’s available on the portal.

eMN also hosted a 90 minute webinar in June on two BRIC markets - Russia and China. A further webinar is scheduled for later in the year and will focus on another of the market reports from the Digital Portal.
ETC OPERATIONS GROUPS

The Brazil Operations Group

Brazils Operations Group has launched its 25th annual competition to find the best tourism journalists.

This initiative aims to reward journalists for their work in helping to inspire and motivate tourists, recognising that they can do this in many different ways, such as through images, information, news and reviews. Nine journalists will be awarded the prize of a trip to Spain, this year’s host country.

The journalism competition is a positive way to encourage, recognise and value the work of journalists who spread the word about European tourism destinations through a range of different media and who help to promote a positive image of Europe in Brazil.

For more information, visit www.concursoeuropajornalismo.com

Best Tourism Journalists

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The US Operations Group

Travel + Leisure EUROPOP Showcases Twenty-two Destinations

ETC’s US Operations Group recently teamed up with Travel + Leisure, a leading US tourism publication, to stage the first-ever EUROPOP, a one-night-only trade and consumer event that brought to life some of the authentic sights, tastes, sounds and products of Europe. Hosted at the Altman Building in New York City in early June, the event featured more than twenty destinations, ranging from the Mediterranean to Scandinavia.

“We are thrilled to collaborate with the ETC on EUROPOP, a fun and engaging way to experience so many destinations all in one place. This one-night pop of culture will provide inspiration for T+L readers and consumers as they plan their next getaway,” said Jay Meyer, Publisher of Travel + Leisure.

Twenty-two of ETC’s National Tourism Organisation members took part in EUROPOP. Each destination had an individual stand with a backdrop of stunning imagery. An ETC table represented all non-participating member countries. A total of 120 trade and media representatives attended the first two-hour private trade preview, with over 500 consumers attending the following three-hour consumer event.

Peter De Wilde, President of the ETC, commented: “We’re pleased to invite Travel + Leisure readers to join us at this unique event that will bring them a little closer to the sounds, tastes and experiences that await them in Europe.”

As well as getting inspiration and information for planning a European vacation, visitors enjoyed Ruffino Wines, Stella Artois beer, Ultimate Vodka and artisan products from Shop Latitude. They were also able to relax in an American Airlines lounge.

Prior to the event, the US Operations Group ran a related communications campaign in Travel + Leisure outlets. This included print inserts in the April and May issues of Travel + Leisure magazine, a customised landing page and dedicated e-mail blasts, newsletter and social media posts. Each print insert reached a potential audience of over 6 million readers, while the digital and social media inserts recorded a total of 1.7 million views.
ETC RESEARCH & DEVELOPMENT

Market Intelligence Group

New Study on Meetings, Congress, Conventions and Incentive Tourism

MCCI is a fast growing industry segment that generates high revenues for both cities and countries. As emerging destinations are increasingly gaining a competitive edge in this industry, it is vital for Destination Europe to understand more about organisers’ expectations, needs and the factors that influence their decision-making.

A new study on MCCI tourism provides a detailed overview of this sector including insight into the best practices of selected National Tourism Organisations [NTOs], public congress bureaus, city and regional tourist boards.

The study will be carried out in 2014 and the first results will be available in spring 2015.

Exploring Russian and CIS Outbound Travel

One of the core activities of ETC is to help its members make informed decisions on which markets and segments offer the best potential for tourism to Europe.

This year, our focus is on Russia and selected countries of the Commonwealth of Independent States [CIS], namely Ukraine, Belarus, Kazakhstan and Azerbaijan.

These markets are increasingly playing a significant role in the growth of tourism and it is important that industry professionals have a clear insight into this market’s past performance as well as future potential, particularly in the light of current political tensions.

A significant recent development is that Russian-speaking travellers have become avid internet users and bloggers. The ETC-UNWTO Study Understanding Russian Outbound Tourism – What the Russian

Blogosphere is Saying about Europe analyses the attitudes and opinions of both current and prospective Russian-speaking travellers as expressed in social media, with special focus on those travelling to and within Europe.

This second study is part of a broader research project aiming at analysing the tourism potential of selected CIS countries.

An ad-hoc study will provide a comprehensive overview of selected countries (Russia, Ukraine, Belarus, Kazakhstan and Azerbaijan) and an in-depth analysis of the outbound travel market, drawing from existing data. This study is expected to be available by the end of this year.

These studies are intended to become a destination’s ideal companion in discovering and understanding the behaviour and mindset of outbound travellers from Russia and the Commonwealth of Independent States.

TourMIS: Making Statistics Easier to Handle

Since the mid 1990s, TourMIS, the online marketing information system, has been providing support to the European tourism sector through the exchange of tourism statistics.

Earlier this year, ETC’s Market Intelligence Group [MIG] and Executive Unit decided to invest further in the platform by making it easier to use and, ultimately, more helpful to tourism practitioners. Already, a new and more time-efficient way of uploading data onto the platform has been introduced. Other changes will include an improved navigation system and the facility to create personalised views. We expect these improvements will have a positive impact on the number of ETC members who contribute to the TourMIS platform.

In the future we plan to put more emphasis on spreading the word on new developments in order to help members and other users to get more benefit from this unique database. www.tourmis.info
In an increasingly vibrant landscape, marked by new players, technological innovation and rapidly-changing consumers, it is important to closely monitor other destinations’ efforts to win market shares in the global tourism market.

To best support its members in this area, ETC commissioned a study of best practice examples in tourism and promotion strategies from outside Europe. The result of this study is a series of six reports on key strategic markets for ETC and its members – Brazil, Canada, China, Japan, Russia and the USA. Currently, only the reports on China and Brazil have been published.

These easy-to-read reports provide key facts and insights into the strategic vision and operational activities that tourism destinations outside Europe are developing to attract visitors from the most promising source markets. The reports contain references to other publicly available data and personal interviews with NTO marketing directors, representatives of the travel trade and industry experts.

Investigating the Marketing Strategies of Tourism Destinations

Russia has become the third largest source market for Europe in recent years. European destinations received nearly 33 million arrivals from Russia in 2013, with forecasts pointing to a 3.6% growth in 2014. However, the escalation of the Crimea crisis this year may abruptly change trends in travel from Russia.

The European tourism sector is not a direct target of international sanctions introduced in response to the crisis but it does suffer indirectly. The weakening ruble, a by-product of deteriorating trade relationships, has reduced outbound travel from Russia. The climate of hostility and uncertainty in the region, amplified by media coverage, is also a factor.

The fear of hostility and anti-Russian sentiment during trips to European countries is another significant concern as are rumours, particularly on social media, that travel visas are becoming increasingly hard to obtain.

National Tourism Organisations can play a crucial role in containing the negative impact of this crisis by addressing the information needs of travellers and all industry stakeholders in an efficient, timely and responsible manner. The ETC Executive Unit is monitoring the situation closely and will provide information to its members and co-ordinate actions to mitigate impacts.

New Analysis of European Tourism Growth Markets

Total European foreign visitor arrivals have grown by 4.8% on average in each of the four years to 2013.

This growth has included some significant differences in performance by destination. In general, though, the fastest growing markets tend to be smaller while larger, more mature origin markets grow at a slower pace. For example, travel to the rest of Europe from Germany, as the largest origin market, rose by just 1.5% in 2013. By contrast, Chinese tourists comprise just 1.3% of European arrivals, but grew by 23% in 2013.

A new study by ETC, the European Tourism Portfolio Analysis, assesses the importance of different source markets for the region and its sub-regions. It compares travel growth with the size of the travel market and analyses the contribution that source markets make to overall destination performance. This analysis offers a balanced view of both the current and, more importantly, the future importance of source markets in Europe and worldwide.

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Making progress, moving forward: An update on ETC reform

Continued from page 1

Central to this work is the notion that future growth and competitiveness can only be achieved through a common European strategy for tourism, one that is grounded in public-private partnerships under a common Destination Europe brand. ETC must take advantage of Europe’s tourism offerings and increase market shares in both emerging and established markets. ETC must align its market mix and identify underserved segments, such as senior tourism and LGBT, and further expand its understanding of pan-European product development.

In other words, ETC must emphasise Europe’s diversity - natural scenery, cultural wealth, history, quality of life, and safety - in order to stimulate demand for European tourism products. At the same time, it is essential to tailor offerings to travellers’ requirements, taking into account their cultural background, special needs, etc.

By promoting pan-European thematic experiences, ETC is seeking to both raise the visibility of the plethora of products available and to create awareness of the region’s diversity and the many factors that differentiate one country from another. This will both encourage targeted product development while embracing the very differences that make Europe so special.

However, while Europe is also admired for its quality infrastructure and safety, legal (visa requirements) and perceptual barriers inhibit tourism flows. In order to remain competitive and foster sustainable growth, ETC must help to tackle these challenges and further develop the future of European tourism.

Peter De Wilde, ETC President

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European Spas Association Congress

Earlier this year, health tourism professionals from both private and public sectors gathered in Vejle, Denmark, for the Annual ESPA Congress. Their aim was to discuss advances in spa management, the latest research and integration into the wider economy.

The European Spas Association (ESPA) (www.espa-ehv.eu) is an umbrella industry organisation representing 20 members from 19 European countries. Its objective is to promote spas and the study of medicinal springs in Europe and to ensure that natural remedies based on mineral water, landscape and climate will be available to as great a number of people as possible.

Speakers at the May event comprised both local and international experts. ETC was represented by Stefanie Gallob (ETC Executive Unit) who participated in a panel discussing EU potential and the exploration of health and medical tourism for destination marketing.

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Calendar of Webinars 2014

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<td>24th SEPT</td>
<td>The Travel Activities Market in Europe: Activities, Attractions, Events and Tours of Visitors in Europe</td>
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ETC MEMBER ORGANISATIONS

- Austria
  Austrian National Tourist Office (ANTO)

- Belgium
  Flanders: Visit Flanders
  Wallonia: Tourist Office for Brussels and Wallonia (OPT)

- Bulgaria
  Bulgarian State Agency for Tourism

- Croatia
  Croatian National Tourist Board (CNTB)

- Cyprus
  Cyprus Tourism Organisation (CTO)

- Czech Republic
  CzechTourism

- Denmark
  VisitDenmark

- Estonia
  Estonian Tourist Board - Enterprise Estonia

- Finland
  Finnish Tourist Board (MEK)

- 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 2014

- 10th TourMIS Workshop
  Vienna on 11th September

- ETC & UNWTO International Seminar on Knowledge Management & Transfer for Tourism Destinations
  Vienna on 12th September

- ETC General Meeting
  Romania on 6th - 7th October

- ETC Forum on Market Trends
  San Giuliano Terme on 27th October

- ETC & ETOA Global European Marketplace (GEM)
  London on 31st October

- ETC Press Conference at WTM London
  London on 4th November

- eMarketing Network Annual Meeting
  Barcelona, Spain on 19th November

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