



ETC BULLETIN

News from the European Travel Commission

January - April 2015

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Breaking the boundaries of travel inspiration: The all new VisitEurope.com

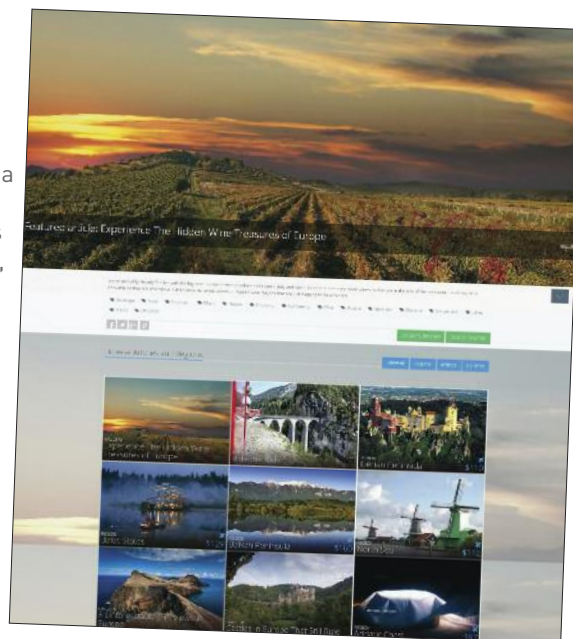
For those with a boundless desire to travel, the new and much-improved **VisitEurope.com** provides a trusted source of information. The site has been designed to inspire unforgettable and authentic journeys that will create a lifelong passion for exploring the continent. With more than 30 countries and over 100 unique items of engaging, pan-European content at its core, **VisitEurope.com** is the product of a near 20-year legacy.

Following its recent revamp, the site is now aimed at a new generation of travellers with content ranging from recommended trips to articles and from videos to photo galleries.

The site has a simple menu structure and a balanced mix of full-width images, interactive maps and smaller content modules. The portal uses a smart grid system which allows users to see a wide range of information within a single page while simultaneously experiencing small bursts of visually compelling images to create a sense of progressive discovery during their browsing experience.

Your never-ending European trip

The Trips menu features a series of recommended multi-destination trips on different themes. Each trip detail page



highlights places and activities along the route as well as relevant before-you-go travel tips. Each step is simple and accompanied by an interactive map that shows the location of every point of interest. Users can add the entire recommended trip to their personal itinerary (or customise it to include just the steps they like the most) in the Plan section of the website.

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Industry Leaders Discuss How to Re-energise Tourism to Europe

As growth in emerging markets outpaces the 'old continent', a panel of tourism leaders, from both the public and private sectors, met in November 2014 at the World Travel Market to discuss what Europe needs to do to stem its declining share of world tourism.

Eduardo Santander, ETC's Executive Director, reported that European destinations are expected to grow by 2.1% a year on average in the coming years, 0.3% slower than previously, whereas worldwide international arrivals will grow much faster by 3.5%.

"It is essential to increase funds to promote Europe as a unique..."

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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 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 Growth), the Organisation for Economic Co-operation & Development (OECD) and the European Tourism Association (ETOA).

Who is Who at ETC?



Eduardo SANTANDER
Executive Director



Valeria CROCE
Head of Research



Teodora MARINSKA
Head of Finance and Administration



Miguel GALLEGU
Head of Marketing and Communication



Stefanie GALLOB
Project Manager – Research



Iulia NICULICA
Administration Project Manager



Güneş VURAL
Project Manager – Online Marketing

Our two interns are Daniela Buzova (University of Valencia) and Zuzana Helikova (King's College London).

ETC PARTNERSHIPS

A Promising Future Ahead for European Tourism

Many of the changes that took place in 2014 are bringing a breath of fresh air to European tourism.

One event which has marked the beginning of a new chapter is the election of new Members of the European Parliament (MEPs) and the re-election of Martin Schulz.

Following the appointment of Jean-Claude Juncker as President of the European Commission in July 2014 and the individual hearings of the Commissioners-designate in September, the European Parliament gave its support to the new European Commission.

The tourism portfolio remains in the former DG ENTR, now called Internal Market, Industry, Entrepreneurship and SMEs (DG Growth). The new Commissioner, Elzbieta Bienkowska, started her term of office on the 1st November. The Polish former Deputy Prime Minister has confirmed her commitment to tourism in Europe.

ETC was awarded a third European Commission grant for 2015 to support its work in maintaining Europe's number one



Martin Schulz, President of the European Parliament and Eduardo Santander, Executive Director of ETC.

position as a tourist destination. This grant will allow ETC to focus on developing activities that promote pan-European content and experiences, such as the updated and renewed [VisitEurope.com](#) portal, and which will help inspire overseas travellers to visit Europe.

In another sign of the rising importance of tourism as a driving force for economic growth, the European Parliament's main political parties have set up an intergroup on 'European tourism development,



Elzbieta Bienkowska, Commissioner for Internal Market, Industry, Entrepreneurship and SMEs, Copyright European Commission.

cultural heritage, Way of St. James and other European cultural routes'. The intergroup will include MEPs from at least three different political parties and will tackle specific issues affecting tourism during the current parliamentary term (2014-2019).

The tourism industry has appreciated the move, saying: "We welcome the formation of the new intergroup, as it recognises the importance of tourism to the wider European community."

ETC Actively Participated in European Tourism Day

The future of tourism in Europe was once again in the spotlight during the recent European Tourism Day, organised by the European Commission and held on the 1st December.

Industry delegates and other stakeholders debated key topics such as the Destination(s) Europe brand initiative, challenges related to digital tourism, opportunities for streamlining the regulatory and administrative framework and the feasibility of an EU tourism services quality initiative.

Eduardo Santander, ETC's Executive Director, provided an update on *Destination Europe 2020* activities and the redeveloped [VisitEurope.com](#) portal. He emphasised the increased global competition faced by the European tourism industry from emerging destinations and the need to respond to the shifting patterns in global tourism in



order to remain competitive and foster sustainable growth.

Extensive market research has revealed that potential visitors to Europe seek inspiration and are drawn to the region by the amount of experiences they can enjoy rather than the number of countries they can visit. Pan-European themes that stand out in this context are products such as cultural routes, heritage, gastronomy, shopping tourism, active and adventure tourism, health and well-being tourism, education, religious tourism.

Santander explained that the main purpose of the *Destination Europe 2020*

initiative is to stimulate competitiveness and promote the sustainable growth of European tourism. Through the promotion of pan-European themes and transnational experiences on the [VisitEurope.com](#) portal, ETC is aiming to raise visibility for the vast range of products available in Europe and to create awareness of the region's diversity.

He concluded that, to achieve these aims, we need:

- a strengthened collaboration between tourism organisations
- a deep co-operation between public and private sector stakeholders
- an inclusive holistic approach for the joint promotion of Europe as a tourist destination
- intensive market research
- more appealing tourism products
- increased tourism promotion budgets.

MARKETING ACTIVITIES

Switzerland Tourism's 'Time' Takes Top Honour at the ETC Film Awards

Videos are proving to be a major resource for travellers searching for inspiration on where to go on their next trip. That's why, to help recognise the work that many destinations are doing to connect with their viewers through video content, ETC organised a new Film Awards to honour the best European tourism film of 2014.

A total of 24 short films from different NTO members of ETC entered the competition. The jury, headed by Alexander Kammel from the tourism film festival organisation CIFFT, selected 'Time' from Switzerland as the best of the year. This short video invites viewers to join local greybeards Sebi and Paul on their mission to remove all clocks from their traditional mountain village. As the pair trudge through fascinating winter landscapes, their pile of discarded timepieces grows, turning the area into a peaceful and relaxing resort where visitors can lose track of time.



From left to right: Peter De Wilde (ETC), Michael Steuer (GNTB, on behalf of Switzerland Tourism), Mirela Matichescu (Romanian NAT), Alexandru Priscu (Bran Castle).

"This film succeeds in appealing to large audiences in an intelligent and ironic way, while showcasing the beauty and the core values of the destination," said Kammel. The film will be entered in the CIFFT tourism film festival circuit in 2015.

The runners-up were 'Piazze d'Italia' from Italy and 'The Sounds of the Wild Atlantic Way' from Ireland. All video entries can be seen on VisitEurope's official YouTube channel.

The winner was announced at a ceremony held in the famous Bran Castle in Transylvania, Romania, commonly known as Dracula's Castle. The award ceremony took place as part of ETC's 88th General Meeting in October 2014. During the award ceremony, BBC Travel Show host Rajan Datar spoke to the audience about the latest trends in travel video production and the significance of storytelling and personal experiences in creating a prosperous tourism video.

Roll The Dice: A Gamified Approach for Marketing Europe

ETC has developed a new interactive online game designed to educate, motivate and engage users to discover the most diverse travel destination worldwide: Europe.

Based on the invented travel game developed for the EuroShorts film competition last year, Roll the Dice is an online board game envisaged as a multi-platform web application with a strong focus on social media.

By rolling a virtual dice, players can create their perfect - yet random - European itineraries, at the same time learning more about 100+ different European destinations through entertaining quiz questions. Players are also able to share their online travel experiences with friends



by creating and sending amusing postcards via different social media channels.

The Roll the Dice online campaign uses gamification to present the wide diversity of experiences in different locations across the continent. The overall aim is for pan-European routes to gain more visibility and inspire users to consider visiting Europe as their next travel destination.

This campaign is part of the *Destination Europe 2020* initiative in co-operation with the European Commission.

Create your own pan-European route on www.RolltheDiceGame.com



Breaking the Boundaries of Travel Inspiration: The New VisitEurope.com

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Get inspired by Europe

The Inspiration section features themed articles, photo galleries and regional videos in an easy-to-navigate grid layout to help users rapidly skim through the content that interests them the most.

All article pages feature large photos, narrowing the user's focus down to the content and giving them a helpful browsing experience. Each individual travel article focusses on a different European theme, from classics such as culture, history and heritage, and gastronomy to more sophisticated themes such as industry, education and ecotourism. Articles are based on different experiences that will appeal to readers' emotions and inspire them to get out of their comfort zone and take action.

Galleries feature high quality images in sliders, with simple descriptions to support the high-quality photography. Short videos, optimised for social sharing, introduce each of the 15 regions in the continent. Curious users can explore the country detail pages and, through these, access the official websites of their National Tourism Organisations.

Plan your own European adventure

The Plan section of the site provides potential travellers to Europe with an

intuitive and efficient tool which they can use to explore and build their own customised European trip.

Using powerful Amadeus Extreme Search technology, the best deals from hundreds of international airports and a diverse range of European destinations are shown instantly over a full calendar year. Results, based on a user's preferences such as budget and date of travel, are displayed on an interactive map.

Be social

Users can get the most out of the website when logging in with Facebook as they are then able to retrieve their favourite photos, videos and articles. They can also see in the Plan section where in Europe their Facebook friends have already been.

VisitEurope.com is available in six languages, each with market-focussed content. The Plan section is optimised for the Americas - including the US, Canada, Argentina, Brazil and Chile - as well as Russia and Japan, from where it is possible to calculate the price of a long-haul flight to Europe. The portal is also optimised for mobile, with a clean layout and typography, in order to deliver an easy reading experience on any device.

The new **VisitEurope.com** has been developed with the support of the European Commission.

A Focus on Strategic Content Development

eMN Annual Meeting

How National Tourism Organisations can develop online content was the theme of ETC's e-Marketing Network (eMN) Annual Meeting. The one-day event, organised with support from the Digital Tourism Think Tank, was held on the 19th November in Barcelona.

Destination Marketing expert Tomas Vanderplaetse provided insights on strategic content development, with a focus on the importance of storytelling and experiential marketing to encourage content sharing on new and existing platforms.

The meeting also discussed the content development strategy behind the brand new VisitEurope.com, as well as the latest ETC digital initiatives, including the Roll the Dice online campaign and a web analytics benchmarking system for NTOs.

The eMN meeting was held on the eve of the Digital Tourism Innovation Campus, the annual flagship event for DMOs. ETC's staff Miguel Gallego and Teodora Marinska presented the new **VisitEurope.com** portal to the audience gathered in the Mobile World Centre in Barcelona.



Miguel Gallego and Teodora Marinska (ETC) presenting the new VisitEurope.com at DTIC 2014.

MARKETING ACTIVITIES

'Le Cose da Fare' wins My Euroshorts 2014 Competition

Last summer, ETC invited European travellers from around the globe to enter a competition to win a holiday for two by sharing a short video of their journey. The competition was part of the My EuroShorts campaign 2014 and marked a move away from professionally released videos and towards community-generated content.

'Le Cose da Fare' by Andrea Venditti was the best short film selected from a broad range of submissions from six continents. The video shows the best moments of the journey of two young Italian travellers during an InterRail trip through three different countries.

Inspired by Black Elk's speech 'The Great Vision', the film not only shows landmarks, but also local people, different accents and food – all of the ingredients



needed for a never-ending journey through the 'old continent'.

The winner was chosen by a panel of film professionals and members of the public voting via the Visit Europe Facebook fan page. The winning video can be seen on the campaign website www.euroshorts-films.com as well as on the VisitEurope official YouTube channel.

The 2014 campaign followed on from last year's successful EuroShorts film competition which focussed on using the power of video as a major influencer, not only for creating travel inspiration but also as a means of stimulating user generated content. My EuroShorts campaign was part of the *Destination Europe 2020* initiative and was supported by the European Commission.

Industry Leaders Discuss How to Re-Energise Tourism to Europe

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...destination, especially in third country markets, where there is growing demand," said Santander. "If not, Europe's share of international tourism will decline even more rapidly."

Half of all international arrivals to Europe are currently generated by only eight markets, mainly intra-regional and with modest growth rates. Although this statistic illustrates the risks of a growth slowdown, it also demonstrates the potential to attract more visitors from a larger portfolio of markets, especially from the fast growing economies overseas.

"Some emerging origin markets such as Russia and China have become much more important recently, with strong growth in household wealth and spending power. However, these two markets combined still only represented 7% of tourism arrivals in 2013," pointed out Martin Craigs, CEO of the Pacific Asia Travel Association (PATA).



From L-R: Eduardo Santander (ETC), Tom Jenkins (ETOA), Pedro Ortún (EC).

The current highly complex regulatory framework, separate visa policies, air passenger duty and a lack of a clear brand image are still creating hassle and expense, and "prevent these people from visiting," said Tom Jenkins, CEO of the European Tourism Association, ETOA. "These are priority areas that need to be addressed urgently by all the relevant authorities."

Pedro Ortún, Director Tourism of the European Commission, stated that tourism can be a powerful tool to fight against the short- and long-term structural challenges that Europe has

recently faced, such as aging populations, the Euro crisis and growing (youth) unemployment.

"Since 95% of enterprises in tourism are SMEs, tourism encourages the entrepreneurial spirit and ensures jobs for Europeans. It is the Commission's aim to ensure Europe's visibility as a unique destination and we are implementing several initiatives to support tourism growth," said Ortún.

One of those initiatives is *Destination Europe 2020*, a joint programme with ETC, to promote Europe based on market intelligence, industry consultation and a greater use of technology.

The leaders' debate was followed by the unveiling of the new VisitEurope.com portal, built by ETC's technology partner Amadeus in conjunction with the international travel marketing alliance, Travel Consul.

ETC OPERATIONS GROUPS

The China Operations Group

Europe Promotes Winter Travel in China

Europe is home to some of the most spectacular winter scenery in the world. There is something for everyone – from extreme adrenaline sports to calm, relaxing activities.

This is the key message of ETC's China Operations Group *Winter in Europe* campaign, which takes place in January at the Wucaicheng Shopping Center in Beijing.

A total of 16 breathtaking winter scenes from different European regions will be on display to encourage people to visit Europe in wintertime. By scanning QR codes with their mobile phones, customers can interact with the images and learn more about the destinations, download photos and information and share them on social media. In addition, an interactive area will allow people to take photos of their favourite winter scenes and share it on Weibo and WeChat to get a chance to win a prize.

The interactive offline-to-online campaign aims to create awareness of pan-European regions, engage and drive viral activity around Visit Europe's Weibo and WeChat accounts. Thousands of potential customers are expected to visit the exhibition daily.



Visitors take photos with European landscapes.

The Brazil Operations Group

Strategic Partnership Brings Brazilian Operators to Europe

ETC's Brazil OG in partnership with ETOA (European Tourism Association) and BRAZTOA (Brazilian Tour Operator Association) brought a group of 16 Brazilian tour operators to attend ETOA's B2B workshop, the Global European Marketplace (GEM), previously available only to ETOA members.

The workshop took place on the 31st October 2014 in London, UK. BRAZTOA buyers joined ETOA's tour operators to meet European suppliers, for an intense day of pre-scheduled business appointments. Over 250 international tourism contractors and 350 European suppliers participated in GEM - a total of 7,000 appointments.



The group of Brazilian tour operators in Brugge (Belgium).

Marco Ferraz, Chairman of BRAZTOA, said: "We are very happy and pleased with the invitation and the ETC/ETOA partnership. It is the first time that a Brazilian tourism association has established such close ties with a similar European entity. We are sure that this meeting will be very important and productive for business improvement and for sharing information about the specific needs of tourists from Brazil."

Following the workshop, the group of Brazilian operators took part in a two day familiarisation trip to Belgium, sponsored by Visit Flanders and Eurail Group.

Brazilian Journalists Discover Europe's UNESCO World Heritage Cities



The winners of ETC's journalism prize.

The popular ETC Journalism Prize reached its twenty-fifth birthday in 2014 with more than one hundred submissions by Brazilian journalists. The entries competed in nine different categories including best newspaper article, best online article, best travel blog and best art photography etc.

The winning journalists were invited to take part in a press trip to Spain which took place in November 2014. They had the chance to visit several UNESCO World Heritage Cities such as Toledo, Alcala de Henares and Cuenca.

Each of the winners also received a plaque of honour from ETC at a prize ceremony held on 25th November in the city of Alcala de Henares. To read the award winning articles, visit www.concursoeuropajornalismo.com

ETC RESEARCH AND DEVELOPMENT

Market Intelligence Group

What the Russian Blogosphere is Saying About Travelling to Europe

Since 2012, ETC has commissioned a number of netnographic studies, exploring the image of Europe in select key markets, as expressed in the blogosphere and on social media platforms. In 2015, ETC and UNWTO will add a new publication to this successful series, *Understanding Russian Outbound Tourism – What the Russian Blogosphere is saying about Europe*.

Russia is increasingly playing a significant role in the growth of tourism and, in the light of recent political tensions, tourism professionals need a clear understanding as never before.

Although much travel in Russia is still booked offline, Russian consumers are increasingly turning towards the internet in their search for travel information.

As one in every three European social media users is Russian, National Tourism

Organisations (NTOs) have already started to establish digital marketing programmes targeting this swiftly expanding online community. Studying the digital footprint that Russian-speaking travellers leave online has become vital for understanding the complexities of their changing consumer behaviour.

Through its innovative approach, the study draws from the raw stream of online conversations as expressed by millions of travellers. It is an essential source of information for every destination seeking to better understand the behaviour and mindset of the Russian-speaking outbound traveller.

Russian consumers are increasingly turning towards the internet in their search for travel information

Knowledge Sharing for Tourism Destinations: From Data to Action



The 10th TourMIS Users' Workshop and International Seminar.

Delegates at the recent 10th TourMIS Users' Workshop and International Seminar on Knowledge Sharing for Tourism Destinations were able to learn from industry experts and discuss possible future steps in developing the TourMIS system.

The event was jointly organised by the European Travel Commission, the UN World Tourism Organization, European Cities Marketing and Modul University, Vienna, and took place in September 2014.

The seminar and workshop focussed on the sub-theme 'from data to action' and gave practitioners insights on how to deal

with the quantity and quality of knowledge provided through the diverse tools now available. Allowing interaction and networking between stakeholders will enable the tourism industry to share and create new knowledge more effectively.

ETC and UNWTO were delighted to welcome Luis Gonzalez Morales (UN Department of Economic and Social Affairs) as a keynote speaker. A number of other eminent specialists from academia and the industry contributed their case studies including Amadeus, Modul University Vienna, IIDD, Creability, University of Lugano, Fáilte Ireland, Vienna Tourist Board, VisitBrussels and Amsterdam Marketing.

29th Annual Meeting of the ETC Market Intelligence Group



REGISTER NOW

in Dublin, Ireland

✿

We are looking forward to welcoming you!




18-20 February 2015 ✿

Introducing the Acting Chairman - ETC Market Intelligence Group

Peter Nash: A Profile

After enjoying almost 15 years of very interesting work at Visit Flanders, Vincent Nijs has begun a new challenge as director in a Belgian private company and Peter Nash, previously Vice-Chairman of the ETC Market Intelligence Group, will act as Chairman of the group until the next annual meeting, to be held on the 18th – 20th February 2015 in Dublin, Ireland.

Currently heading up the Strategy Development & Insights team at Tourism Ireland, Peter Nash has held a wide variety of marketing and strategy roles in both the public and the private sector. An economist by training, he

lectured at the University of Newcastle upon Tyne in Britain. Peter was also senior researcher with Teagasc, the Irish food and agriculture development authority. He then held a variety of research, marketing and strategy roles at Guinness and later Diageo Ireland. More recently, he was head of the School of Business at the National College of Ireland before joining Tourism Ireland.

Nash has been a member of the Market Intelligence Committee of ETC for two years and has been an active member of the Market Intelligence Group for six years.



A Tribute to Mr Tom Ylkänen

Former Vice-Chairman of the ETC Market Intelligence Group

It is never easy to write tributes for friends, especially when clouded by the sadness of their passing. This tribute is written from the perspective of someone who has been privileged to know and work with Tom Ylkänen since 1988.

To us all, Tom meant a lot. A paradox of a man. The quintessential quiet Finn with the traditional Nordic reserve on the one hand, but also the extrovert European with the booming voice and the love of culture, good food and wine on the other hand.

Tom Ylkänen was first and foremost a friend but he was also an expert tourism researcher. A man who not only made a mark within the boundaries of Finnish tourism, but who was also an international expert whose knowledge, experience and opinion were respected and treasured, not only at a European but also at a world level.

Tom was also a great patriot who not only loved his country but also made sure that he infected everyone he met with an enthusiasm and affection for Finland that was second to none.



Tom was more than just a friend or colleague to us all who knew him. He was a solid and integral part of a small family of foreigners who grew up together over the space of almost three decades and went through the ups and downs of life from both the personal and the professional level. A group which remained solid in spite of geographical distances, age differences and cultural diversity.

I last met Tom in September 2013 in Vienna when he came to receive a commemoration from ETC for his service

and contribution as the longest serving, founding member of ETC's Market Intelligence Group and for being the Group's Vice-Chairman during the last twelve years or so. Little did I know that, when we said our goodbyes, we would never have the opportunity to meet again.

I have to confess that I shed quite a few warm and fat tears when I heard the news of his passing. With his loss a part of me has died too. But I shall forever treasure his memory, his voice, his mannerisms, his sense of humour, his friendship and all the other little things through which he will remain alive in me.

On behalf of all your ETC friends, kiitos Tom Ylkänen for enriching our life. We feel gifted to have had the pleasure of knowing you. And for all the good times we had together, kippis our old friend. Your light will keep shining within us forever.

Leslie Vella
Director of Marketing Support & Development, Malta Tourism Authority, Valletta
Former Chairman, Market Intelligence Group, ETC

ETC RESEARCH AND DEVELOPMENT

European Tourism: 2014 Performance and Outlook for 2015

European tourism has continued to grow robustly throughout 2014 and has proved resilient to headwinds. Data from the first three quarters of last year paint a very positive picture for destinations in Europe, with growth spread across virtually all destinations. Growth in arrivals has been mirrored in growth in overnights, a sign of more travel for short breaks on top of main holidays.

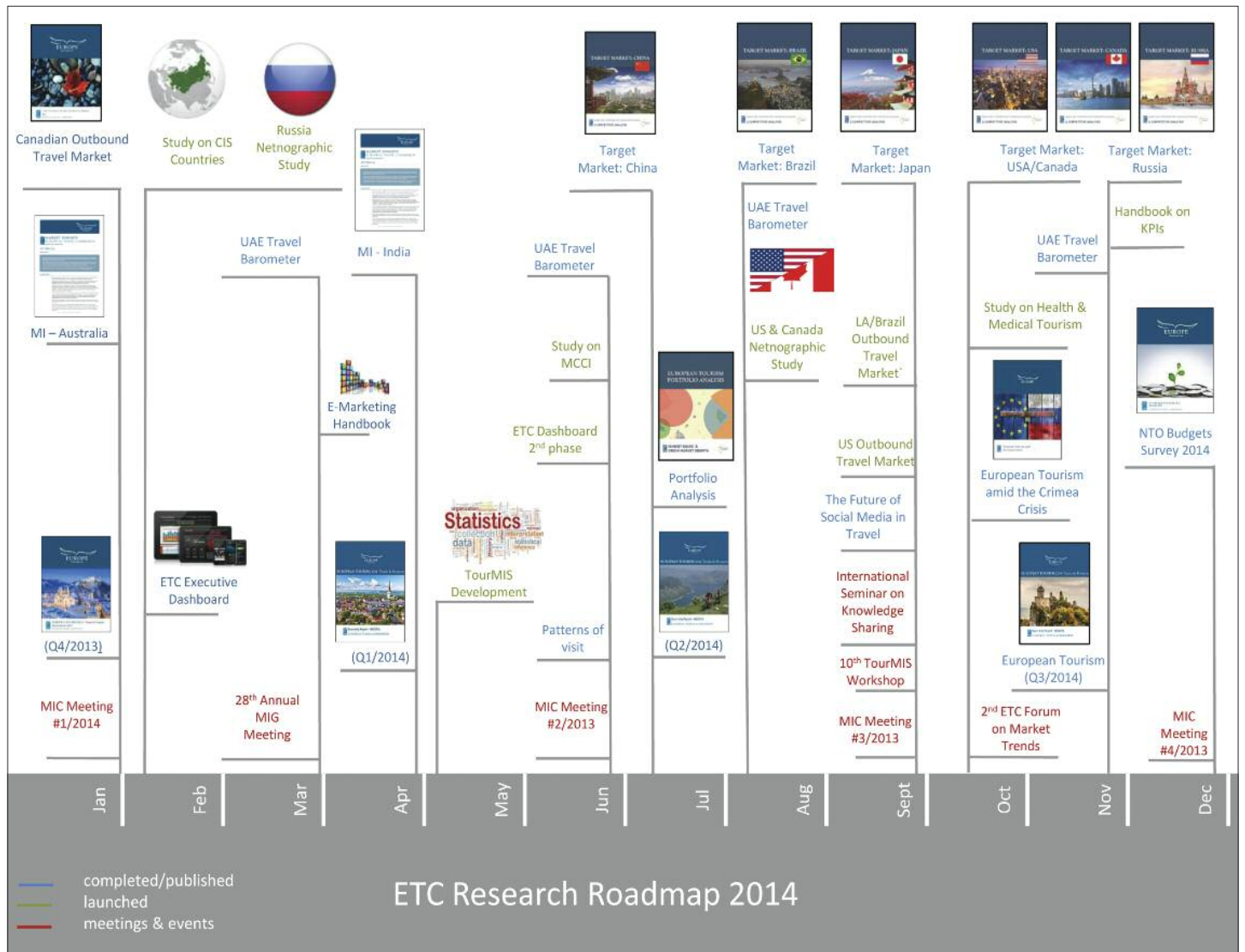
Established source markets in Europe remained key to the success of many destinations in the region. Germany, the European tourism powerhouse, reached all-time records in outbound travel in 2014. The UK market eventually rebounded and delivered its full potential, with growth in nights outpacing that in arrivals.

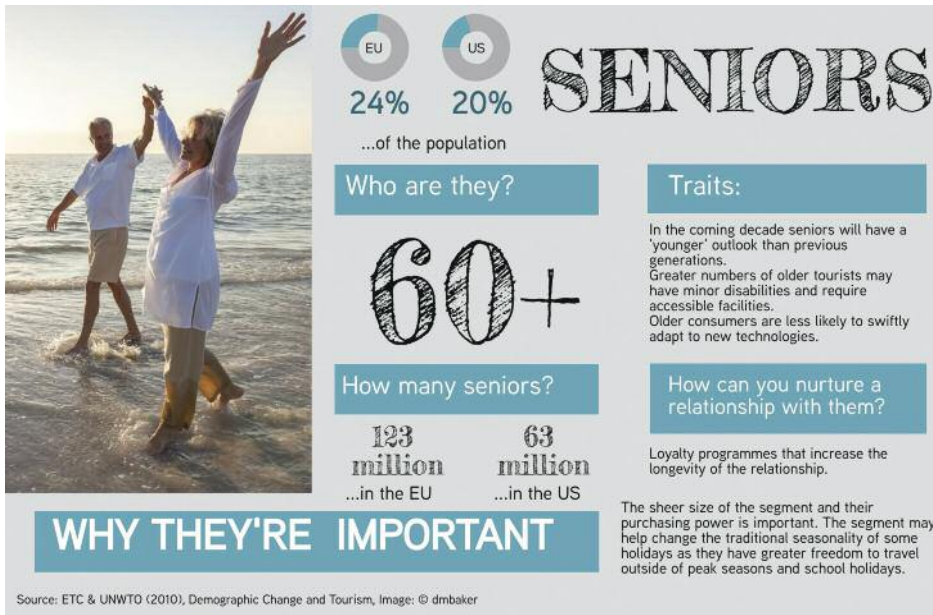
European tourism has continued to grow robustly throughout 2014 - a very positive picture, with growth spread across virtually all destinations

Positive signals also came from France and the Netherlands, although consumer sentiment remained weak and travel habits cost-conscious. Even outbound travel from Italy grew strongly in most of Europe, despite persistent economic

recession. The strong performance of European and overseas markets offset a weak Russian market.

A balanced guest mix and targeted marketing activities have made European destinations less vulnerable to market downswings and crises. Despite the abrupt decline in growth from Russia, Latin American economies in low gear, Japan's anaemic economy, floods and natural disasters, and misperceptions about the Ebola threat, European tourism is expected to grow by 4% in 2014, on top of the sustained growth over the last 4 years. The ETC outlook for this year remains positive, as we expect ETC members to grow by 2.5% to 3.5% as an aggregate.





How Satisfied are International Travellers with their European Experience?

Understanding travellers' satisfaction with the different components of their travel experience is essential for any destination wishing to build a reputation and compete successfully in an increasingly complex tourism market place.

ETC Snapshots is a series of reports on select travel segments and markets prepared by the ETC Executive Unit. These lean reports provide a quick overview of travellers' characteristics, the likes and dislikes of their holiday experience and their satisfaction with Europe compared to competing regions. Key recommendations are drawn from findings with the aim of providing support to ETC's members.

In 2014, ETC's focus was on two important demographic segments, *seniors* and

youth. Formerly a niche segment, seniors have become an important target segment both in Europe and worldwide. These reports present the opportunities and challenges that tourist destinations need be aware of in order to delight segments with very distinctive requirements. On the other side of the age spectrum, youth are amongst the world's most active travellers.

This year, the Executive Unit will publish a number of reports on select traveller segments that will allow ETC and its member National Tourism Organisations (NTOs) to gain an insight into how visitors' experiences will impact reputation and the destination's ability to recruit future visitors. The reports are available to ETC members only.

ETC and FEST Collaborate Towards Sustainability in Tourism

ETC recently signed an agreement with the Foundation for European Sustainable Tourism (FEST), committing to support governments, academies and organisations to plan, deliver and manage sustainable tourism programmes and projects.

FEST focusses on three key factors for tourism success and competitiveness: governance, leadership and management, and is the copyright owner of the PM4SD® (Project Management for Sustainable Tourism) methodology.



ETC's role in the partnership will be to support the organisation of PM4SD® courses across Europe throughout 2015. PM4SD® is a certified methodology by APMG International that has attracted interest from a number of high level institutions, such as the Global Partnership for Sustainable Tourism, the United Nations Development Programme, the United Nations Environment Programme, the George Washington University plus GIZ and EU institutions.

The qualification enables project managers to efficiently plan and implement tourism related projects with a special focus on sustainability.

PM4SD® applies the use of sustainability criteria as a practical and scientific tool to planning and monitoring activities.

Visit pm4esd.eu for more information.

Calendar of Webinars 2015

28th January Tourism Economics European Tourism – Trends & Prospects (Quarterly Reports)

23rd April Tourism Economics European Tourism – Trends & Prospects (Quarterly Reports)

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**
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

- 75th **ETC Board of Directors' Meeting** in Brussels, Belgium on 22nd January
- 29th **Annual Meeting of the ETC Market Intelligence Group (MIG)** Dublin, Ireland on 18th - 20th February
- **Towards Joint Promotion of Europe as a Tourist Destination - Workshop** ITB Berlin, Germany on 4th March
- 89th ETC **General Meeting** and 76th ETC **Board of Directors' Meeting** Riga, Latvia on 21st - 22nd April

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