Peter De Wilde re-elected as ETC President

The 93rd ETC General Meeting, held in Porto in May 2017, re-elected Peter De Wilde, CEO of Visit Flanders, as President of the European Travel Commission for the next three-year term.

Mr De Wilde’s former mandate focussed on three main pillars: marketing Europe in long-haul destinations, strengthening the European tourism industry and improving governance of the organisation. He said: “Looking back, I am proud to see that, thanks to the support of ETC members and new associates, the reform proved successful for the growth of ETC as an organisation.

Europe gears up to capitalise on prowess of China as a source market

Outbound travel from China has grown at a double-digit pace in the last decade, reaching record numbers in 2016, when over 10 million Chinese visitors arrived in Europe. ETC forecasts an annual average growth of +9.3% for Chinese travellers in Europe over the next five years.

In this context, Europe is gearing up to garner a bigger share of this market by deepening cooperation with the Chinese authorities and the local travel and tourism industry.

Such initiatives have been for Europe to become the first ever Official Partner Destination of ITB China (Shanghai, 10-12 May) and for ETC, in cooperation with ETOA, to organise the first World Bridge Tourism conference and workshop (Shanghai, 9-10 May) held in conjunction with the Tourism Fair.

Co-funded by the European Commission, both initiatives served as the first preparatory actions towards the 2018 EU-China Tourism Year.

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Where does ETC operate?
ETC currently promotes and markets Destination Europe in four major overseas markets: Brazil, Canada, China and the USA. Each ETC Operations Group (OG) is formed by representatives of European NTOs operating in these markets and is headed by a Chairperson. Every year OGs define a programme of activities to promote Europe and develop collaborations with the local industry. ETC’s focus will shift gradually towards emerging markets in the coming years.

Who are our members?
ETC 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.

Since 2016, with the aim of building alliances to jointly support the tourism sector in Europe, ETC has broadened its approach, reaching out to the private travel and tourism industry and creating an Associate Membership programme.
Peter De Wilde re-elected as ETC President

"ETC is moving on the right path to become the voice of tourism in Europe."

Mr De Wilde’s commitment and hard work earned him the support of all ETC members, who acknowledged his achievements and entrusted him to lead the European Travel Commission over the next three years.

During the next mandate, Mr De Wilde intends to continue his work on developing ETC in view of the challenges that the new socio-economic and disruptive environment in Europe have brought forward, and to broaden the organisation’s focus to include new topics. Priorities for the next three years include increasing the ETC membership network in Europe, selecting new advocacy themes and target markets, defining new actions to tackle current issues affecting tourism in Europe, continuing the involvement of ETC with the private sector and implementing a marketing strategy for Destination Europe.

I look forward to working together with all members, ETC bodies and the Executive Unit to successfully face the goals and challenges that lie ahead of us.

ETC President, Peter De Wilde

Latest research: Sustainable Tourism in Europe - Status Quo and Common Challenges

At its 89th General Meeting in April 2015, ETC approved its first advocacy programme covering, among other topics, an increased focus on sustainability issues within European tourism. One of ETC’s three Vice-Presidents, Ólöf Yrr Atladóttir, was given responsibility for implementing this new focus.

In order to form an ETC perspective on sustainability, members agreed to gather knowledge on how the matter is addressed in individual member countries and to compile an overview of the approaches and actions already in place. The proposal was to produce a report summarising the current situation in Europe, EU standpoint on sustainability in tourism, and any systematic approaches within ETC member states.

A decision was made to allocate financial support for a post-graduate research project aimed at exploring these issues. The Master thesis was assigned to Silvia Fontolan, a graduate of the international Master’s degree course in Planning and Management of Tourism Systems at the University of Bergamo, Italy. The project was launched on 18 February 2016 and the study was published at the end of May 2017.

The study - Sustainable Tourism in Europe - Status Quo and Common Challenges - benchmarks sustainable tourism practices within the formal environment of European NTOs. The paper outlines key challenges and advantages, and proves the wide acceptance of sustainable tourism development as a driver of a destination’s long-term competitiveness. The report will become a foundation upon which ETC will build recommendations for public organisations to work towards a sustainable and competitive future for the industry in Europe. It is available for free download at www.etc-corporate.org
ETC ADVOCACY

ETC members discuss innovative solutions for improving Europe’s competitiveness

Organised under the framework of the ETC General Meeting in Porto, the Travel and Tourism Competitiveness Workshop brought together full and associate members of ETC to discuss Europe’s travel and tourism performance, its key competitive advantages, strengths and weaknesses, and areas for development.

On this occasion, Roberto Crotti, Economist at the World Economic Forum, presented the results of their 2017 edition of the Travel and Tourism Competitiveness Report, with a specific focus on Europe. This report ranks 136 countries across 14 separate dimensions, revealing how well countries could deliver sustainable economic and societal benefits through their travel and tourism sector. Spain, France and Germany continue to top the travel and tourism rankings in the report. Based on the findings, the workshop explored the implications of the results for NTOs, for the private sector and for policy makers at a national and a European level.

Europe remains the most competitive tourism destination, but the competition is growing. Other countries are seizing the opportunities presented by this sector, which keeps building bridges rather than walls between people.

Roberto Crotti, Economist at the World Economic Forum

ETC members engaged in breakout discussions relating to key advantages that Europe should build on, and areas for development which it should tackle. Connectivity, job creation and entrepreneurship, regional integration, branding and security were among the topics addressed during the workshop which focussed on a solutions approach, asking participants to consider specific actions needed to ensure Europe meets its objective.

Finally, an intra-European discussion examined competitiveness at a sub-regional level and considered the policy shifts required at a national level.

ETC Vice-President, Mark Henry, took an active role in shaping the programme of the event, as well as in moderating the interactive discussion.

The meeting ended with the identification of key policy areas that require a focus by national governments, European organisations or the private sector in order to enhance Europe’s travel and tourism competitiveness.

Mr Henry concluded: “ETC members identified the opportunity to grow nations’ focus on tourism as a priority sector; to cluster products and regions thematically to encourage dispersion; to improve transport connectivity into Europe; and for greater visa liberalisation. To support continued growth, we need to attract new employees by growing the tourism sector’s appeal as a vocation and improve educational standards.”

Some of the emerging challenges for Europe now are to increase the sector’s digitisation, to use ‘big data’ to improve our marketing and the tourist experience, and to become more sustainable and deal effectively with climate change.

ETC Vice-President, Mark Henry

Europe remains the most competitive tourism destination, but the competition is growing. Other countries are seizing the opportunities presented by this sector, which keeps building bridges rather than walls between people.

Roberto Crotti, Economist at the World Economic Forum

ETC members actively involved in discussions at the Travel and Tourism Competitiveness Workshop held at Casa da Música, Porto, Portugal, on 17 May 2017.
Support from the European Parliament

Interview with István Ujhelyi MEP:

Tourism is one of the most important economic sectors, its role in job creation and its value to GDP are evident. Tourism is the industry of peace and it has the unique ability to connect people from different cultural or social backgrounds. I have been working for this industry during my entire political career and, as current Vice-Chair of the TRAN Committee responsible for the Tourism Task Force, I understand the way this industry and tourism policy work on local, national and international levels.

It is of crucial importance for tourism to be high on the EU policy agenda, particularly when there are so many topics to focus on simultaneously. We must keep fighting for results in the fields of visa facilitation, tax policy and sharing economy.

In parallel with this effort, 2017 - the Year for Sustainable Tourism, has given us the chance to discuss SMART solutions in the tourism industry and involve the regions more in our work. By the end of this year, we will also see the European Capital of Tourism project begin.

In next few months, a very important topic will be the preparation for the 2018 EU-China Tourism Year, an excellent opportunity to focus on visitors from third countries. China’s development in the past 30 years has been one of the most impressive success stories. Right from its announcement by President Xi Jinping, I felt that it would be something which will shape the next decade and will become one of the most determining initiatives in the world.

It is for this reason that, with key figures and stakeholders from Brussels, I founded the Europe-China One Belt One Road Culture & Tourism Development Committee, and created a platform for politicians, businessmen and professional stakeholders interested in EU-China relations. Our main objective is to try to highlight that exchanges, especially in tourism and culture, are an engine for sustainable social and economic development.

I am extremely proud that the OBOR Committee will be a special partner of the EU-China Tourism Year and hopefully it will have the chance to take over the activities after 2018 and create a legacy we can all be proud of.

Interview with Andrey Novakov MEP:

Tourism represents the third biggest industry in the EU, employing 12 million people and contributing an annual revenue of EUR 356 billion to the European economy. I cannot find any better argument to defend the importance and the crucial role of tourism. It stimulates economic growth, generates revenue and investments, and exports jobs. For this reason, tourism should always have a central position in the EU debate and policies, and I think the 2018 EU-China Tourism Year is a step in the right direction.

With 2018 approaching, the tourism sector in Europe is presented with a huge opportunity and we have to be ready and creative and use its potential at maximum. I believe that every member state should be involved in this initiative and that, working together, the EU-China Tourism Year has the potential to create a great positive impact. In that sense, I would like to propose the nomination of 27 national ambassadors of the EU-China Tourism Year, one from each member state, who would be responsible for promoting and organising national events in support of the actions of the initiative.

I would like to see real and concrete results for European tourism from this initiative. I recently initiated a pilot project to address an important issue in view of the upcoming EU-China year: how to improve the qualification and skills in hospitality services to better welcome Chinese tourists. The project is called Getting Ready for Chinese Tourists and represents a state-of-the-art, easily accessible, online European course offering insights into the incoming Chinese tourist market. It aims to create a better understanding of incoming Chinese tourists, in order to offer them better hospitality and generate positive feedback on Europe as a destination on Chinese social media. Target groups are Europeans employed in the hospitality, leisure and tourism industries as well as entrepreneurs and students in these fields. I have the support of the main EU tourism stakeholders and I really hope to get the approval of the European Commission.

"It is in our common interest to take advantage of the potential offered by the One Belt One Road project and hence to contribute to the improvement of EU-China relations."
ETC presents the 2018 EU-China Tourism Year in Bulgaria

An event, aimed at presenting the European Commission’s initiative 2018 EU-China Tourism Year to Bulgarian tourism stakeholders and business community, was organised by Andrey Novakov, Member of the European Parliament, in partnership with ETC and the Bulgarian-Chinese Business Development Association. The event was intended to create opportunities for new investment flows in the tourism sector in Bulgaria.

ETC Head of Public Affairs, Teodora Marinska, presenting the 2018 EU-China Tourism Year, commented: “ETC has a long-standing partnership with the European Commission. The European Commission and the China National Tourism Administration are working closely on preparations for the year and expect to see an unprecedented level of initiatives aimed at the growing importance of China as a source market to Destination Europe.

Capitalising on the success of our joint Destination Europe 2020 programme, as well as our experience of promoting European destinations in China, ETC was designated as the body to officially implement the activities related to the 2018 EU-China Tourism Year.”

ETC and Eurail storytelling competition

Europe has many stories to tell. It is steeped in history, culture and has different meanings for different people. Would you be able to capture its essence in a thousand words? This was the challenge that VisitEurope.com and ETC associate member, Eurail Group, opened to all travellers across Europe to win a first class Eurail Global Pass.

The #MyEuropeStory storytelling competition earlier this year invited current and past travellers to share their most inspiring rail travel experiences across Europe. More than 200 stories from travellers across Europe to win a first class Eurail Global Pass.

The #MyEuropeStory storytelling competition earlier this year invited current and past travellers to share their most inspiring rail travel experiences across Europe. More than 200 stories from travellers across Europe were shared on www.myeuropestory.com. Ten stories were shortlisted and opened to a public vote. The results were received a rail pass for two people, valid for travel in 28 countries in Europe for one month.

The story that received most votes was from Italian storyteller, Miriam Tribastone, who paraphrasing author Gianrico Carofiglio - disclosed that “the hours spent travelling, the rushes to get on the trains, the heat and the rain, laughs and hugs, heavy backpacks and an ungrammatical English [...] youth, curiosity, and love and, of course, an incredible taste of adventure that will lead us to another trip around Europe”...the essence of Europe is hidden between the photographs of an old-fashioned album or a smartphone.

The campaign website received 30,000 views from more than 10,000 users. The best stories will be regularly published on VisitEurope.com as well as in other future communication by Eurail Group to continue inspiring travellers to discover more of the continent.

Value Retail and ETC research project

Following its mission to strengthen the sustainable development of Europe as a tourist destination, ETC actively welcomes ad hoc marketing and research collaborations with its associate members, guided by a shared vision and purpose that recognise the value of combined efforts and contribution of all members.

The study on the Gulf Cooperation Council (GCC) Outbound Travel Market will mark the first joint research-related project between ETC and one of its associate members.

ETC is very pleased to cooperate with Value Retail in order to provide ETC and UNWTO members with a thorough analysis examining the potential of travellers from the GCC outbound market, with a special focus on Europe as a tourist destination. This study will shed light on the travel patterns and behaviour of GCC nationals, who represent a fast-growing market with the potential to make a significant contribution to European inbound travel flows in the coming years.

We gratefully acknowledge the support of Value Retail for contributing to this project.

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ETC MARKETING ACTIVITIES

Europe gears up to capitalise on prowess of China as a source market

Continued from page 1

ITB China
ETC created a dedicated Europe Pavilion at ITB China, the new marketplace for the travel trade industry, which featured 60 exhibitors from a multitude of destinations, paired with strong individual national presentations of other major European destinations. A total of 945 pre-scheduled appointments between co-exhibitors and Chinese-hosted buyers were arranged at the Europe Pavilion during the three-day event.

Eduardo Santander, ETC Executive Director said: “ITB China has placed Europe higher in its agenda, contributing to making our destinations more attractive and competitive. Travel and tourism promotes reciprocal understanding and, in order to do so, our Chinese customers must continue to be catered for with the best offer in Europe adapted to their particular needs and expectations. We are happy and honoured to have been ITB China’s first destination partner for 2017. This has been only the beginning of the preparations for the 2018 EU-China Tourism Year.”

European culture was also showcased during the official opening ceremony of ITB China, which featured four cultural performances: Austrian classical music, a Walloon saxophone, a Czech piano and Italian opera.

Ludivine Destreé, Chinese Market Manager of the Belgian Tourist Office, Wallonia, one of the strongest co-exhibitors on the Europe Pavilion, commented: “In three years in China, I have taken part in different tourism fairs and I can say that ITB was really well organised. There were a lot of interesting and interested buyers. Our partners, who came from Wallonia especially for the fair, were very satisfied with the quantity and quality of the buyers.”

Other co-exhibitors of the Europe Pavilion mentioned the leveraged brand visibility, the establishing of new business contacts and the easy and concern-free participation as the main reasons for attending ITB China under the umbrella of ETC.

World Bridge Tourism
This initiative, funded by the European Union, is being implemented jointly by ETC and ETOA with the aim of increasing the flows of visitors from China to the EU. The first event of the World Bridge Tourism (WBT) combined a conference, held before the official opening of ITB China, and a B2B workshop between tourism-related EU companies and Chinese operators.

The World Bridge Tourism project is supported by an extensive programme of research and webinars aimed at enhancing the understanding of the needs of Chinese visitors within the European tourism community. All types of European tourism operators were invited to take part in the events and participation was free of charge.

The project is specifically designed for small and medium tourism operators and participation was open to businesses that have a proven record of working in China, or can demonstrate investments aimed at approaching the Chinese market. Enterprises from all tourism sub-sectors and other organisations that have a proven interest in the Chinese market and add value to the B2B matchmaking process (such as museums and exhibition centres) were specifically targeted. All participants shared their satisfaction with the event which will be repeated in London, UK, on 3 November 2017.

“It was an amazing event, perfectly organised, with the best selection of buyers and the best conference I have ever attended in China. All panellists were really quality people in the travel industry in China giving huge added value to the event,” commented Loredana Pettinati, Luxury Connoisseurs.

We are happy and honoured to have been ITB China’s first destination partner for 2017. This has been only the beginning of the preparations for the 2018 EU-China Tourism Year.”

Eduardo Santander, ETC Executive Director
How authenticity drives modern travel

Authentic media will play a major role in the future of travel marketing. It is largely due to the expectations of today’s millennial travellers (aged 19-36) who have grown up using social media and are not only accustomed to consuming more content than ever before, but also to create it.

According to a recent report from Chute, a user-generated content platform specialising in travel and destinations, 78% of millennial travellers prefer photos taken by real customers over professionally-branded photos. Chute asked consumers to choose pictures that would mostly inspire them to travel from a series of pictures depicting the same location, either taken by fellow consumers or professionally by destinations. Without knowing, 74% chose images taken by fellow travellers.

The lack of authentic and customer-focused content is currently affecting travel brands and destinations attempting to reach young travellers through social media. According to Chute, 75% of travellers do not follow destinations on social media, 52% of these are even unaware that destinations have a social presence.

Millennials require an innovative marketing approach. According to the report only 1% find traditional advertisements to be influential. Millennials want to interact with destinations and travel brands in the same way they interact with their peers - by engaging on social media. According to a study conducted by Elite Daily, 62% of them state that they are more likely to become loyal customers to a brand that interacts with them on a social network.

According to Chute’s survey 2017 State of Travel on Instagram on millennial travellers, social media is the leading source for millennial travel inspiration. In terms of ranking, after Facebook, travellers turn to YouTube and Instagram to find travel content. On Facebook, travellers prefer travel brands and destinations to post photos and videos created by or featuring other travellers (32%), while on Instagram, searching by geolocation is key for discovery.

However, Millennials are not just seeking out authentic content – they are also creating it: 64% of them post on social media to recommend a product or service at least once a month. Over the course of 2016, more than 98.5 million photos related to travel were shared on Instagram.

Europe’s hidden gems at the 2017 New York Times Travel Show

Four ETC member destinations (the Czech Republic, Poland, Slovakia and Serbia) presented themselves under the European umbrella during The New York Times Travel Show in New York City (27-29 January 2017). The New York Times Travel Show is the largest trade and consumer trade show in North America.

The three-day event had a focus on Europe with two dedicated panel discussions on what is new in the most visited and undiscovered destinations in Europe. Both panels included speakers from different ETC member NTOs based in New York City.

The United States ranks first among all overseas outbound travellers to Europe. 27.5 million Americans arrived in Europe in 2016 which accounts for a 26% share of all US outbound travel. ETC forecasts a 5.2% average annual growth in arrivals to 2021.
ETC RESEARCH ACTIVITIES

ETC Market Intelligence Group: New Chairman

A new Chairman for ETC Market Intelligence Group - Sérgio Guerreiro (Turismo de Portugal) – was elected at the Annual Meeting. The new Chairman shared his ambitions to position ETC’s research work as an international reference and to encourage the collaborative work between research and marketing experts across Europe. He also shared plans to capitalise on “knowledge management as a tool to inspire better business decisions and to stimulate innovation in a constantly changing environment”.

Mr Guerreiro will be supported by Emőke Halassy (Hungary) and Emil Kukalj (Montenegro) acting as Vice-Chairpersons of the expert group. These newly-elected officers will also be responsible for chairing the ETC Market Intelligence Committee (MIC) of the group.

ETC is very thankful for the dedicated work and unwavering leadership of Peter Nash (Tourism Ireland) - previous Chairman of the ETC’s expert research group.

ETC marketing and research experts meet to exchange knowledge and build ideas

The Annual Meeting of the ETC Market Intelligence Group (MIG) and the Marketing Group (MKG) brought together, for the second time, marketing and research experts from ETC Member NTOs. The event was organised with the kind support of the National Tourism Organisation of Montenegro and took place in Budva from 2 - 3 March 2017.

Present at the meeting were ETC research partners, notably the European Tourism Association (ETOA) and the World Tourism Organisation (UNWTO). The event provided participants with a unique platform for sharing market intelligence, key travel and tourism trends, and best practices in the fields of geotagging in tourism research, crisis communication strategies, sustainability, big data use and tourism information systems. The meeting also offered the opportunity to enjoy the wonderful sights of Montenegro.
ETC interactive web content – coming soon!

In light of the digital era, ETC is applying new ways of distributing tourism market intelligence. The new web content will be shared on the ETC corporate website and allow members, partners and the broader audience to quickly interact with data and discover things on their own, while having fun.

The first interactive content is based on the ETC study on Consumer Lifestyle Trends and Tourism and summarises key information on five long-term behavioural and attitudinal trends that ultimately shape and impact travel preferences – The End of Adventure, Constructive Tourism, Social Living, Personality without People and No Escape.

UNWTO High-Level Task Force on Tourism and Security

The ongoing collaboration between ETC and UNWTO continues to be of crucial importance in ensuring success in promoting the sustainable development of Europe as a tourist destination and addressing challenges faced by the region. As a member of the High-Level Task Force on Tourism and Security (HLTFTS), ETC was represented at the first meeting of the group which was organised by the World Tourism Organization (UNWTO) with the aim of reinforcing cooperation towards a safer, more secure and yet more seamless travel.

Held on 10 May in Madrid, the 1st HLTFTS meeting debated areas related to security in tourism.

Representatives of UNWTO member states, United Nations organisations and private sector entities set the primary issues to focus on, such as the integration of national and tourism security, support of the sector in setting crisis management plans, travel advisories, seamless travel procedures including visa policies and crisis communication. These matters are to be addressed by specific working groups tasked with developing recommendations and guidelines to be presented at the UNWTO General Assembly.

ETC-supported MBA thesis investigating resident attitudes towards tourism in Bruges

Thanks to the cooperation between ETC and MODUL University, Vincent Nijs is the first employee from an ETC member NTO (Visit Flanders) to graduate from the Viennese Private University tackling a very current topic in his Masters’ Thesis: Tourism Carrying Capacity. Despite strong tourism pressure on the city, Bruges inhabitants still support tourism activities and believe the advantages of tourism outweigh the negative impacts. An international model on resident attitudes was tested for the first time in a European heritage destination looking for the drivers of resident support for tourism.

“Three in four inhabitants support tourism and 90% want Bruges to remain a top tourism destination.” In addition, the study reveals the relationship between citizen pride and resident perception of the positive impact of tourism.

From left to right: Flemish Tourism Minister, Ben Weyts; Vincent Nijs, Visit Flanders; and Bruges Mayor, Renaat Landuyt.
Interview with Tourism Economics on European tourism trends and prospects for 2017

For almost a decade, ETC and Tourism Economics have been partnering to monitor and analyse the overall performance of the European tourism industry. Today, ETC’s European Tourism - Trends & Prospects is one of the organisation’s most powerful tools and comprises a series of quarterly reports that offer a concise analysis of key economic and tourism trends in Europe and in relevant outbound markets. The quarterly reports are aimed at providing the know-how necessary to monitor the short-term development of European tourism. They are available to the wider public and can be downloaded for free - www.etc-corporate.org/trends-watch

What does the outlook for European Tourism look like in the next four months of 2017, considering the region’s performance in 2016 (+2%), growth registered so far this year and the impact of safety and security concerns on European tourism demand?

Tourism Economics still expect some recovery in European Tourism demand in 2017, which is evident in the performance data for the year to date. The slower growth in 2016 was impacted by some significant security concerns. Travel to France, Belgium and Turkey, in particular, experienced falls in international demand. The share of European travel to these destinations fell and there was some clear displacement to other destinations. In addition to this, overall European demand from large long-haul source markets suffered. Demand from China, Japan and some other Asian markets was weaker than overall outbound travel from these markets, and weaker than the economic trends would suggest.

Given the continued growth in the world economy into 2017, underlying travel demand remains robust from a range of markets. This will support a rebound in growth as security fears, for travel to Europe as a whole, are fading. Performance indicators for early 2017 show a clear pick-up in demand from both long- and short-haul source markets for travel to European destinations. However, some security fears are lingering and continued attacks will undermine recovery. Recent trends indicate that safety concerns are now more directed towards specific destinations rather than towards Europe as a single entity.

Are there any major reasons for concern regarding the new US Administration’s policies on international trade, immigration and climate change, and the potential impact on European Tourism performance in 2017?

These policies will have large repercussions for the travel industry, as we have seen that they affect sentiment and travel demand. However, the bulk of the impact will be felt within the US itself and Tourism Economics is predicting a decline of 2 million visits to the US this year, despite the continued global economic growth. A message is being transmitted that the US is no longer a welcoming destination.

These policies do represent an upside opportunity for European destinations which should be able to gain market share from this antipathy towards the US; the GCC, and other Middle Eastern markets offer clear opportunities. These markets already travel to European destinations in large numbers and tend to spend more than many other visitors. A large return could therefore be gained from a relatively small improvement in visitor volume.

A downside risk of such unfavourable policies that has to be acknowledged is the laptops ban on certain routes. An extension of the ban to all transatlantic flights has been discussed and, if enacted, would have further impacts on security perception and could easily deter some travellers. But we believe that the wider the ban is imposed, the less impact it will have. A comprehensive laptop ban on travel both to and from the US (including both US and European airlines) would generate minimal antipathy as it would not be perceived as a discriminatory act against a particular set of travellers.

Besides the influence of terror attacks on the perception and intention to travel to Europe, are there any other matters (e.g. visa facilitation, connectivity etc.) that European tourism authorities and destinations should not overlook to sustain the region’s competitiveness in the future?

In order to retain competitiveness, to maintain and even grow market share, destinations must remain easily accessible. Physical access in terms of flight capacity on direct routes must be increased to meet rising demand from all key markets. Alternative destinations will be visited if they are easier to reach. Destinations must ensure that the necessary infrastructure is in place, including sufficient airport capacity, to enable this growth.

Visitor visas must also be easily available to potential travellers. Visa-free travel, or simpler visa on arrival or e-visa processes, have helped to raise tourism demand worldwide; more restrictive visa processes have been followed by falls in travel demand. There are clearly many valid reasons to maintain visa requirements for certain markets, including security and safety concerns. But a better use of all available information and technology can help to facilitate visa processes and maximise tourism demand.

The importance of clear information about destinations, including destination marketing, should also not be overlooked. We have estimated large returns on marketing investment for destinations, with spillover benefits to the wider economy. A strong embrace of the available technology, including improvements in online content and use of the available booking and review platforms, has clear benefits for destinations. An improved understanding of a destination helps to raise awareness and competitiveness.
### ETC Member Organisations

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<th>Country</th>
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<td>Austria</td>
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<td>Flanders: Visit Flanders, Wallonia: Wallonie Belgique Tourisme (WBT)</td>
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<td>Montenegro</td>
<td>National Tourist Organisation of Montenegro</td>
</tr>
<tr>
<td>Norway</td>
<td>Innovation Norway</td>
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<tr>
<td>Poland</td>
<td>Polish Tourist Organisation (PTO)</td>
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<tr>
<td>Portugal</td>
<td>Turismo de Portugal, I.P.</td>
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<tr>
<td>Romania</td>
<td>Romanian Ministry of Tourism</td>
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<tr>
<td>San Marino</td>
<td>State Office for Tourism</td>
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<tr>
<td>Serbia</td>
<td>National Tourism Organisation of Serbia (NTOS)</td>
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<tr>
<td>Slovakia</td>
<td>Ministry of Transport and Construction of the Slovak Republic</td>
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<tr>
<td>Slovenia</td>
<td>Slovenian Tourist Board</td>
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<tr>
<td>Spain</td>
<td>Turespaña - Instituto de Turismo</td>
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<tr>
<td>Switzerland</td>
<td>Tourism Switzerland</td>
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<tr>
<td>Turkey</td>
<td>Ministry of Culture and Tourism</td>
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</tbody>
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### ETC Agenda 2017

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>7 - 8 Sept</td>
<td>13th TourMIS Workshop and international seminar MODUL University Vienna, Austria</td>
</tr>
<tr>
<td>18 Sept</td>
<td>Destination Europe Travel Trade Seminar Guangzhou, China</td>
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<tr>
<td>25 Sept</td>
<td>Award ceremony – European Communication Award 2017 São Paulo, Brazil</td>
</tr>
<tr>
<td>27 Sept</td>
<td>World Tourism Day</td>
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<tr>
<td>18 - 19 Oct</td>
<td>European Tourism Forum Tallinn, Estonia</td>
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<tr>
<td>3 Nov</td>
<td>Word Tourism Bridge - Europe London, United Kingdom</td>
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<tr>
<td>10 Nov</td>
<td>European Receptionat FESTURIS – Festivaldo Turismo de Gramado Gramado, Brazil</td>
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<tr>
<td>16 - 17 Nov</td>
<td>International Seminar on Transnational Tourism Themes and Routes Santiago de Compostela, Spain</td>
</tr>
<tr>
<td>22 - 24 Nov</td>
<td>ETC Board of Directors #86 and General Meeting #94 Budapest, Hungary</td>
</tr>
</tbody>
</table>

### Contact ETC

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