



ETC BULLETIN

News from the European Travel Commission

January-April 2014

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Collaboration ensures an exciting future for Europe

Why? Everything starts with a question and this new stage in the eMN group is not an exception. Why should we work together to promote Europe as a tourist destination online? The answer is quite simple: because we are lucky enough to be able to do it.

Let's sum up a bit: the European Travel Commission is the organisation responsible for the promotion of Europe as a tourist destination. Thirty-three countries join forces to take Europe to destinations where they are not so well-known and take advantage of Brand Europe's popularity to bring tourists to our territories.

This is, more or less, the main goal of the ETC which, I hope you agree with me, is quite enough to justify co-operation between its members. Nevertheless, if you still want more, we can take a look at the second goal as stated on ETC's website: "Assist member NTOs to exchange knowledge and work collaboratively."



Bernardo Caballero, Head of Online Marketing at Turespaña and newly appointed chairman of the ETC e-Marketing Network (eMN).

This second objective means an opportunity for all of us: an opportunity to learn from each other, to share our successes and our failures (we learn from both alike), to find out new exciting ways of promotion or to discard the ones that don't work. It is not easy to think about this when you are at work and you still have to dedicate some of your time to the ETC issues but it is a wonderful opportunity to collaborate with thirty-two people from different

countries to promote one of the most important regions in the world.

It is indeed exciting, especially when you think this task is meant to be fulfilled, in the eMN case, in the digital environment with its endless opportunities and multiple platforms to operate and work with.

We must think of the eMN as the perfect framework in which we can share best practices and put together ideas that can, of course, enhance Europe's role as a leading tourist destination in Brazil,

Peter De Wilde Elected New President of ETC



Mr Peter De Wilde, CEO of the Tourist Office for Flanders (Belgium), was elected President of the ETC at the 86th General Meeting in Brussels (Belgium) on 30th January. "ETC markets one of the strongest brands in the world: Europe. Our marketing activities are crucial for the strengthening of Europe's economic and symbolic capital. We must increase the awareness amongst political leaders that the tourism industry is a guarantee for sustainable economic and social growth" said Peter De Wilde.

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

Who is Who at ETC?

From left to right: Valeria Croce: Head of Department Research & Development, Gunes Vural: Trainee Marketing & Communication, Stefanie Gallob: Project Manager Research & Development, Jean-Francois Serpieter: Online Marketing Manager, Teodora Marinska: Finance, HR & Administration Manager, Eduardo Santander: Executive Director, Annelies Waegeman: Project Manager Marketing, Miguel Gallego: Marketing, PR & Communication Manager, Iulia Niculica: Trainee Office Management and Nika Kampus: Trainee Research & Development.



ETC MARKETING ACTIVITIES

ETC at World Travel Market London 2013

The first findings of an overseas consultation were presented recently in London by Eduardo Santander, Executive Director of the European Travel Commission (ETC). The consultation was part of the *Destination Europe 2020* joint initiative with the European Commission (EC) and gathered first-hand industry data.

ETC's long-term strategy will focus on the promotion of pan-European, transnational thematic tourism products and experiences that have high potential for the overseas tourist, such as cultural routes, heritage, active and adventure tourism, education, health and wellbeing, sporting activities, religious tourism, shopping and gastronomy.

ETC, with the financial support of the European Commission, has already commissioned the development of a

European portal on gastronomic events to present Europe as an appealing destination offering a range of unique travel experiences related to European cuisine and traditions.

Roll the Dice

During the press conference, film director Sir Alan Parker introduced *Roll the Dice*, the new short film promoting Europe as a travel destination. The film was commissioned by ETC and produced by Screen South following an international competition entitled EuroShorts.

Benoit Detalle (aged 28) and Marija Jacimovic (aged 29) were the winners of the EuroShorts competition. The two young filmmakers from Belgrade created an engaging four minute film, using stop frame animation, which illustrates a journey across Europe where every travel



From left to right: Eduardo Santander (ETC) and Marco Ferraz (BRAZTOA).

decision is made by rolling a pair of dice. The video can be viewed at euroshorts-films.com

A Focus on Brazil

The press conference also focussed on the rapidly growing Brazilian outbound travel market. Thanks to increased social mobility, easier access to credit and attitudes that favour travel, the volume of outbound trips from Brazil grew by an average of 13% a year over the past decade and reached 8.7 million outbound trips in 2012. Brazilian tourist arrivals in Europe totalled 3.1 million, representing one third (36%) of total Brazilian outbound travel.

While at WTM, Eduardo Santander and Marco Ferraz, President of the Brazilian Tour Operators Association (BRAZTOA), signed a Memorandum of Understanding. One of the initiatives that will flow directly from the agreement is the organisation of a three-day workshop in 2014, bringing Brazilian tour operators to Europe.



Roll the Dice at CIFFT Grand Prix 2013

ETC attended the CIFFT Grand Prix award ceremony in Vienna on the 8th November 2013 and presented the EuroShorts project as well as a screening of the *Roll the Dice* short film. More than 270 guests including professionals from the tourism and film industries, attended the event which was organised by CIFFT, the International Committee of Tourism Film Festivals.

The principal objective of the CIFFT Festival is to maintain an international platform to encourage global tourism through audio-visual media.

ETC will enter this year's CIFFT competition with *Roll the Dice* which will result in the film being screened at several European film festivals such as the prestigious Corporate Media & TV Awards in Cannes. Worldwide film festivals include, among others, the US International Film & Video Festival in Los Angeles and TourFilm Brazil in Florianópolis. This will enable ETC to reach an international audience and attain worldwide recognition at highly respected festivals.



From left to right: Annelies Waegeman (ETC) and Eduardo Santander (ETC).

ETC MARKETING ACTIVITIES



Teodora Marinska (ETC) at Digital Tourism Think Tank.

Digital Marketing at the Heart of Europe's Tourism Strategy

Integration of traditional and digital marketing, especially mobile marketing and social media, are the key elements in a successful destination marketing strategy. It's for this reason that Europe's promotion as a travel destination needs to focus on a strong online brand presence to

reach its goals. This was the key message to emerge from ETC's e-Marketing day held last October in Brussels.

The event gathered members of ETC's e-Marketing Network (eMN) as well as representatives from Google, Orbitz

Worldwide, RailEurope and ENAT to discuss best practices for optimising the online presence and accessibility of NTO's websites. The e-Marketing Network is ETC's working group which brings together all of the online marketing experts from European National Tourism Organisations (NTOs) and is committed to providing information and expertise about the use of digital media in promoting Destination Europe.

During the meeting, Bernardo Caballero, Head of Online Marketing at Turespaña, was appointed Chair of the eMN. He succeeds Emese Kútvölgyi of Hungarian Tourism who has been chairing the group for the last two years. The event also provided eMN members with an update on the latest ETC online marketing initiatives, including the development of a new European portal on gastronomic events and the renewal of the current visiteurope.com portal.

ETC was also present at the Digital Tourism Innovation Campus (DTIC) 2013 in Barcelona, where the new VisitEurope iPad app was showcased for the first time. The event gathered together more than 150 online marketing experts to network and exchange ideas and best practice in tourism digital marketing. The new VisitEurope app provoked great interest among participants and the DTIC plans to conduct a case study on the concept of uniting inspiration and conversion – the key aims of the VisitEurope app.



Participants at ETC's e-marketing day in Brussels. From left to right: Kristien Segers (Google), Agnete Sylvest (Denmark), Branislav Chrenka (Slovakia), Emese Kútvölgyi (Hungary), Michael Piscopo (Malta), Bernardo Caballero (Spain), Nick Hall (SE1 Media), Xavier Theret (RailEurope), Eduardo Santander (ETC), Miguel Gallego (ETC), Nic Peeters (Croatia), Annelies Waegeman (ETC), Nebojša Petković (Serbia), Lina Ivanova (Latvia), Jennifer Andre (Orbitz), Chris Veitch (ENAT).

ETC OPERATIONS GROUPS

The China Operations Group

ETC Strengthens Chinese-European Tourism Collaboration

Nearly 200 delegates representing Chinese and European tour operators, travel agencies, National Tourism Organisations, airlines, travel bloggers and media gathered at the Ullens Center for Contemporary Art (UCCA) in Beijing to participate in the last event of the consultation process led by ETC within the framework of the *Destination Europe 2020* initiative.

A Taste of Europe was the name of the full-day conference, which was launched by Neli Nanova, Chair of the ETC's China Operations Group, who emphasised the big opportunities coming up for Chinese-European tourism collaboration. She told delegates: "A better understanding of the profile and specific needs of Chinese travellers, together with a critical review of legal and cultural barriers to travel, will support European destinations to tap into the enormous potential of the

Chinese outbound travel market effectively."

The morning session continued with a think tank covering topics such as perceptions of Destination Europe in China, travel barriers for Chinese visitors in Europe, development of travel packages to Europe, the use of social media in China and the future of tourism promotion and communication. Invited experts led the debates with delegates from across the various stakeholder groups.

The afternoon was dedicated to several keynote presentations including Pedro Ortún, Director for Service Industries in the Directorate-General for Enterprise and Industry in the European Commission; Tom Jenkins, Executive Director of the European Tour Operators Association (ETOA) and Robert Vertes, Tourism Attaché at the Embassy of Hungary in Beijing. During the



Neli Nanova, Chair of ETC's China Operations Group, welcomes delegates at A Taste of Europe.

interactive panel discussion with the Chinese audience following the keynote presentations, ETC introduced its award for the best European travel package provided by a Chinese tour operator.

The event concluded with a food tasting session, including an outstanding on-site demonstration on innovative elements of European cuisine by the renowned Spanish Chef Firo Vázquez.

US Operations Group

Europop to Inspire Travel to Europe in the USA

Europop on the square is the theme of the consumer and trade event organised by ETC's US Operations Group in collaboration with Travel+Leisure as part of a media campaign to drive awareness to the most extraordinary and unique experiences that await travellers in Europe. The event, to be held in the spring in New York City, will invoke the feeling of walking through a classic European square and will immerse attendees in a sensory experience with authentic culinary tastings, live music and performances.

Europe Promotes Train Travel in the Chinese Blogosphere



Train travel is an ideal and comfortable way to discover Europe and thousands of Chinese online users are currently discovering why. As part of a campaign led by ETC's China Operations Group, five popular Chinese travel bloggers are travelling all over the continent and sharing their experience with the largest online community worldwide.

The first blogger is Jia Yunfeng, alias Yi Fu, who is visiting several destinations in the Mediterranean and the Iberian Peninsula. Bloggers Chen Zikun and Wang Sheng are touring through Central European countries for two weeks. Two more bloggers will be travelling through Northern and Eastern Europe shortly.

The campaign is being carried out in collaboration with Eurail.com, which awarded each blogger with a Global Pass, allowing them to flexibly explore the continent by rail, as their followers decide where they should head to next.

According to the recent ETC / UNWTO netnographic study *Understanding Chinese Outbound Tourism - What the Chinese blogosphere is saying about Europe*, China has over half a billion internet users, more than twice as many as the US and representing over a third of the total population. In fact, 68% of Chinese travellers search online before deciding where and how to travel.

ETC OPERATIONS GROUP

The Canada Operations Group

ETC Takes to the Big Screen

ETC Sponsors the European Union Film Festival in Toronto



The ETC was well represented at the European Union Film Festival (EUFF) in Toronto last year.

The new promotional short film, Roll the Dice, was shown before every film screening, helping to promote Europe as a tourism destination in a way that was creatively aligned with the vision of the festival. ETC was also one of the sponsors of the event which was held between the 14th and 27th November.

The European Union Film Festival is the annual festival of European cinema in Toronto and is dedicated to bringing exceptional films from all over the European Union and giving free access to films not distributed or rarely seen in Canada.

Founded in 2004 in response to a perceived Hollywood monotony, this free festival showcases 28 contemporary films drawn from each of the EU's member countries. Now in its 9th year, the official EUFF aims to reflect the excellence, innovation, and diversity of European cinema. EUFF is a unique festival and the only one in the world to bring together different EU Consulates and local cultural institutes in collaboration.

Thanks to the participation of all the Consulates of the European Union in Toronto, films from 28 countries were screened at the Royal Cinema in the heart of Little Italy.

The 2013 participating EU countries were: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom.

The Brazil Operations Group

European Travel Commission Promotes Europe in Brazil

The focus of marketing activities in 2013 for the ETC Brazil Operations Group (OG) was on trade show attendance.

The OG, led by Salvatore Costanzo, was present with its own booth at the 41st ABAV Tourism Fair from September 4th to the 8th in São Paulo, Brazil. The ETC and the National Tourism Organisations of Austria, Croatia, Czech Republic, Italy and Switzerland exhibited together under the VisitEurope brand. ABAV, the Brazilian Travel Agencies Association, is the organisation with the biggest representatives and one of the oldest still active in the Brazilian Tourism sector. The event showcased 62 nations in an area covering 58,200 m² with 750 hosted buyers visiting the trade show over five days.

The Operations Group also exhibited at the Gramado Tourism Trade Show from the 7th to the 10th November 2013 in Gramado, Southern Brazil. This trade fair is considered to be one of the most productive trade shows of Latin America and is attended by key trade representatives with decision making powers.

During two days of intense activity, more than 14,000 tourism professionals passed



From left to right: Paulo Machado (Portugal), Anais Sampaoli (Italy), Adrien Genier (Switzerland), Gisele Ferbani (Ireland), Werner Fritz (Austria), Margaret Grantham (Germany), Clara Sanchez Irigoyen (Spain), Luiz Fernando Destro (Czech Republic) and Jordi Novas Fernandez (Spain).

through the 17,000 m² exhibition venue, visiting over 2,500 exhibitors and 400 stands.

The European Travel Commission (ETC) will also exhibit at the Latin American World Travel Market (WTM) in São Paulo from the 23rd to the 25th April 2014. They will attend as part of the VisitEurope brand along with the National Tourism Organisations of Flanders (Belgium), Ireland, Montenegro and Slovenia.

Other Activities

In 2013, the Brazil OG also organised the Journalism Prize, an annual competition to award the best published tourism article. The competition regularly attracts more than 50 entries and last year the candidates were Italy and Austria. The prize is a trip around the country which chooses to sponsor the prize.

The winners of the 2013 competition were journalists Adriana Moreira (O Estado de São Paulo - winner in the category Best Report on Printed Newspaper), Alex Souza (newspaper Panrotas - winner in the category Journalist Revelation) and Natalia Molina (How to travel blog - winner of the Best Internet Report). They won a weeklong trip to Lucerne and Engelberg, Switzerland, and Cortina d' Ampezzo, Italy.



From left to right: Competition winners, Adriana Moreira, Alex Souza and Nathalia Molina.

ETC RESEARCH & DEVELOPMENT

Monitoring European Tourism Success

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

With a few exceptions, ETC member countries enjoyed a strong year, consolidating tourism as one of the best performing sectors and a key generator of income and employment. The most recent estimates by the UN World Tourism Organization reveal that international arrivals into Europe grew by 5.6%, boosting tourism growth worldwide. This result is well above early expectations as the most optimistic forecasts at the beginning of 2013 pointed to an increase of around 3%.

ETC's quarterly reports on European tourism helped monitor Europe's success as it unfolded. Early indications rejected any suggestion of negative performance and correctly predicted that Europe's internal market would be the decisive

factor for growth in Europe.

As the year went by, the reports monitored how the rebound of the UK and France, on top of strong performances by large markets such as Germany and the US, laid the foundations for a successful year. The reports also identified growth accelerators, such as destinations' targeted and successful campaigns and bottlenecks, such as a stall in air capacity growth.

In 2014, ETC's quarterly reports will be enhanced by the addition of an analysis of Europe's guest mix and a portfolio analysis of the current and potential performance of key markets. The market analysis will be published together with the first report of the *European Tourism in 2014* series.



Taking a Close Look at Promising Markets

Current information on key outbound markets is vital for any tourism business which is why ETC's market intelligence portfolio includes free Market Insights reports. This series of reports provides accessible intelligence and an analysis of both the current and potential situations in specific markets.

In 2013, the ETC Market Intelligence Group commissioned four new reports focussing on Japan, South Korea, India and Australia. The Japan report was published in December 2013 and the South Korea report in January 2014. The India and Australia reports will be published during the first half of 2014. Preliminary findings suggest that, in these markets, interest in taking a trip to Europe remains high. However, each market presents particular opportunities and challenges.

For the Japanese market, for instance, we learn that outbound travel has stagnated over the past few years but also that destinations in Europe have suffered less than destinations in other world regions.



This is mainly explained by Europe's comparative advantage in offering a unique collection of top tourism attractions.

The report also warns of tougher competition from up-and-coming tourism opportunities within Asia which are particularly appealing to new travellers who are typically more inclined to choose closer destinations for their first tourism experience. European destinations will have to work hard to maintain current levels of arrivals from Japan but the size of the market makes the effort worthwhile.

Together with key trends and forecasts, each Market Insights report presents a detailed overview of the country, travel trade, air travel into Europe and travellers' profiles. This year, the Market Insights reports have been enhanced with a description of the most interesting visitor segments.

Market Insights reports can be downloaded free of charge from ETC's corporate website - <http://etc-corporate.org/reports/market-insights>

ETC RESEARCH & DEVELOPMENT

Win With The Lion Forum

The tourism forum *Win with the Lion* is an annual event held in Lviv, a historic tourist destination in the western part of Ukraine.



Stephanie Gallob (ETC) presenting at the Win with the Lion tourism forum.

In November last year, travel industry leaders, decision makers and aspiring young tourism professionals from all over Ukraine and other countries gathered together to

consider and debate a variety of current topics. Subjects included consumer trends and cutting-edge solutions in the digital sphere, new horizons in the experience economy, plus diversification and the sustainable development of tourism in Ukraine.

Speakers comprised both local and international representatives of Google, TripAdvisor, Booking.com, ETOA, Amsterdam Marketing, IMEX Group. The ETC was represented by Stefanie Gallob (ETC Executive Unit) who participated in interactive workshops and discussions on consumer trends and digital marketing strategies.



Delegates at the recent e-Marketing Masterclass.

UNWTO and ETC Masterclass on e-Marketing

One hundred and twenty tourism professionals attended a recent masterclass on e-marketing organised jointly by UNWTO and ETC.

The event, which was held in late October and hosted by Croatia's Ministry of Tourism, helped delegates improve their skills in developing, optimising and evaluating properly integrated e-marketing strategies.

The masterclass drew from the joint UNWTO and ETC *Handbook on E-marketing for Tourism Destinations*, prepared by TEAM Tourism Consulting. Project leader Karin Elgin-Nijhuis, together with authors Christian Baumgartner and Jon Munro, led presentations in three key areas - current trends in e-marketing, mobile marketing and the measurement and evaluation of online marketing strategies. The contribution of e-marketing to build and manage a destination's reputation was a focus of the keynote address by Robert Govers.

"The key to success is being useful to one's customers," said Ms Elgin-Nijhuis at the

launch of the masterclass. "As their time and patience are in seriously short supply, customers should be provided with truly focused information."

Masterclass attendees included directors of various tourism boards within Croatia as well as representatives from other countries. In the words of one of the participants, the masterclass offered "outstandingly relevant and interesting presentations and the discussions that followed were a sign of how the topics and timing of the seminar were appropriate". Participants also praised the presenters' deep theoretical knowledge and practical experience in the field as the key success factor of the event.

ETC researchers will be offered a taste of the masterclass during the forthcoming Annual Meeting of the Market Intelligence Group, to be held in Reykjavik from the 12th to 14th March 2014. Ms Elgin-Nijhuis will give a presentation on the *Handbook on E-marketing for Tourism Destinations* and share her expertise and knowledge with ETC members.

ETC Contributes Shopping Tourism Expertise for UNWTO Report

As an example of its close ongoing collaboration with the UN World Tourism Organization, ETC has recently contributed to an upcoming UNWTO report on Shopping Tourism.

The report, an initiative of the UNWTO Affiliate Members' Programme, is aimed at providing a comprehensive overview of tourism related to shopping and the

impact of this special segment for tourism destinations.

ETC is an unparalleled resource for detailed information on outbound travel and contributed a case study that highlights tourist motivations and shopping behaviour in two of the most promising outbound markets - China and Brazil. Based on ETC's most

recent research, the case study illustrates the travel patterns of those Chinese and Brazilians for whom shopping is a key motivation to travel.

The report on Shopping Tourism will be distributed among UNWTO members and affiliate members on (date TBD).

The following is a tribute to Leslie Vella who stood down recently as Chairman of the ETC Market Intelligence Group.

Thank You, Mr. Chairman

Leslie Vella has, for many years, been an outstanding Chairman of the ETC Market Intelligence Group (MIG) and it was my great privilege and pleasure to work with him as a member of the MIG up to 2012. The Market Intelligence Group works due to the commitment of market research colleagues from the member National Tourism Organisations, and the contribution and commitment of the outgoing Chairman were crucial for the development of the group and the quality of its output.

As Chairman of the group, Leslie was committed to effective collaboration with partners such as the World Tourism Organisation (UNWTO) and championed the development of a series of intelligence reports and studies such as European Trends and Prospects, the quarterly Tourism Trends in Europe, and the Outbound Travel Market studies and Market Insights series, covering all of the major source markets for Europe. These reports and studies provide a solid research and statistical database for marketers of tourism to Europe. He has also overseen the development of a series of handbooks and reports covering many aspects of tourism and published in conjunction with UNWTO. Leslie



Leslie Vella, previously Chairman of the ETC Market Intelligence Group, on the left with Brian Maher.

achieved all of this through the application of his far-reaching expertise and the effective use of his motivational and organisational skills.

And what of the man himself? Witty and erudite, a great raconteur with an unquenchable thirst for knowledge, and a lover of good food, good company and good conversation. A devoted family man and a loyal and true friend. I wish

Leslie continuing success in his career with the Malta Tourism Authority and I have no doubt that Leslie's colleagues in the MIC will be encouraged and inspired by his efforts to continue the excellent work of the group.

Brian Maher
Former Vice Chairman of the ETC Market Intelligence Group

Targeted Decision Making Through Collaborative Benchmarking

One of the core values of ETC is co-operation which we believe will help build the value of tourism across all of the beautiful and diverse countries of Europe.

The annual NTO Budgets Survey is ETC's most successful example of how committed organisations are prepared to share sensitive budgetary information in order to achieve the common goal of building knowledge to enable strategic decision making.

The NTO Budgets Survey benchmarks member NTOs on organisational aspects and budget allocation. In 2013, 30 out of

ETC's 33 members contributed to the study, providing a detailed overview of how National Tourism Organisations are structured and how their activities are funded.

The study has been made possible as a result of the excellent work that has been done by Tourism Flanders, the National Tourism Development Authority of Ireland and members of staff in the participating NTOs. ETC is grateful for their input and would like to thank them for their work and for the time they have invested to make this research possible.



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

ETC PARTNERSHIP WORKING

Public Relations

Four Decades of Successful Co-operation with the European Commission



ETC Executive Director, Eduardo Santander, with Pedro Ortun, Director DG Enterprise & Industry, European Commission, Taleb Rifai, Secretary-General of UNWTO, and Raimonda Balniene, Director of the Lithuanian State Department of Tourism.

One lesser-known but very important goal of the European Travel Commission is to raise awareness and understanding among both European and National authorities, as well as the general public, of the importance of tourism and the need

to ensure its development through relevant and shared activities. ETC has, since its formation, been engaged in continuous dialogue with key public bodies in the tourism sector in order to achieve this major goal.

The European Travel Commission has implemented the principle of “closest co-operation and consulting” with many sectors of the tourism industry. In the earliest years, there were co-ordinating committees in Europe and in the United States which were responsible for the first promotional campaigns.

In 1973, a working group made up of members of the European Economic Community (EEC) who were also members of ETC, put forward a proposal to the EEC Permanent Representatives to establish a Tourism Unit in the Brussels secretariat. This proposal was rejected at the time and ETC followed it up by publishing annual studies on the economic importance of tourism in the EEC.



Former Dutch MEP, P.A.M. Cornelissen, and the European Commission’s then Tourism Director, Patrick Hennessy, at ETC’s 50th anniversary conference in 1998.

In 1985, the EEC established a Tourism Unit within its organisation and the Working Group took on a new character. Closer links were established between ETC and EEC in areas such as collaboration with technical studies. ETC also took part in discussions with National Tourist Organisations that were arranged by the EEC Working Group.

Full support was given to the European Economic Community (EEC) in developing its tourism policy, notably in steps to remove constraints on international travel in Europe. ETC argued strongly that, if the EEC wanted to engage in the promotional, marketing or information aspects of

Collaboration ensures an exciting future for Europe

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Canada, China and USA but also be very handy for our own jobs. I am sure some really good stuff will come out of eMN members which can be useful for all of us.

Just think about what a lot of companies would give to have 33 experienced digital managers thinking in one direction to promote their products. Well, this is what we have within our reach, we just have to reach out a bit and enjoy!

Moreover, ETC is now stronger than it

has ever been, fully supported by the European Commission and with a new and active team which is fully committed to their task, so we really do have a unique chance to come out with good, solid ideas to make Europe and our countries top worldwide destinations. Isn't all this worth giving a try?

Bernardo Caballero
Head of Online Marketing at Turespaña and newly appointed chairman of the ETC e-Marketing Network (eMN).



Pedro Ortun, Director DG Enterprise & Industry, European Commission, speaking at the General Meeting of all ETC members, October 2013.

tourism, this would be better done through ETC as it would be complementary to the activities it already carried out.

The EEC accepted this and a special advertising campaign to promote travel from the United States to EEC countries was undertaken. This paved the way for more extensive collaborative promotion in the future. ETC worked with the Tourism Unit on a range of initiatives, including a joint promotion in the United States and Japan in 1988, further campaigns during the European Year of Tourism in 1990 and a lightning campaign to re-motivate travel to Europe after the Gulf War in 1991.

In recent years, ETC has developed an excellent working relationship with the Tourism Unit of the European Commission's Directorate-General for Enterprise and Industry. ETC is a member of the European Commission's Tourism Consultative Committee and has been one of its advisers on planning the annual European Tourism Forum since the event was first held in 2002.



The joint ETC-EC logo, in which the VisitEurope symbol is combined with the EU stars.

In 2004, the European Commission appointed a consortium to develop a new pan-European portal, the visiteurope.com. The results of the project and funds to support the costs for managing it were then transferred to the ETC, which has been operating the portal ever since the end of 2005.

In 2011, Antonio Tajani, Vice-President of the European Commission and Commissioner for Industry and Entrepreneurship, and Petra Hedorfer, President of ETC at the time, signed a Joint Declaration between the two organisations. The basis of the document was defined in the European Commission's communication *Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe* and in the European Travel Commission's gradual strategic shift towards the promotion of *Destination Europe* in emerging markets. The document set out the principles for strengthening the image and promotion of *Destination Europe* in the future, and outlined key areas of collaboration such as the use of the *Europe – a never ending journey* brand outside of Europe and the development of pan-European cultural routes and thematic tourism products.

Following the joint declaration, ETC was awarded a grant of EUR 1 million in 2012. These funds were designed to support ETC's strategy with a long-term programme designed for use in overseas markets. The first stage of the initiative started in October 2012 and will end in March 2014, while a new grant for the second phase began on 1st January 2014.

A Spotlight on ETOA

The European Tour Operators' Association was formed 25 years' ago. Its principal purpose then




































was to make Europe the best operational environment for incoming operators and this purpose still holds true today. Counting both operators and suppliers, ETOA now has 700 members, 100 of whom joined in the last year. We have over 20 staff, who run seminars on such diverse subjects as the Tour Operators' Margin Scheme, visas, the impact of mega-events on tourism and the latest developments in electronic distribution. ETOA also has developed a portfolio of commercial networking events that operate on a pan-European, national and local level.

ETOA is devoted to bringing in tourists from long haul origin markets by selling Europe as a destination. ETOA and ETC make natural partners. We have been an integral part of the ETC Market Intelligence Group, worked on China as an origin market for ETC and delivered talks in North America. ETC has joined us on our stand at World Travel Market in London. I am delighted that we are planning further close co-operation in 2014: there is every chance that we will be working together to explore and facilitate the importance of Brazil and Japan as origin markets for Europe.

Europe may pride itself on being "the world's favourite tourist destination", but its hold on that position is wholly dependent on appealing to new visitors. How we make it easy for them to come here, and profitable for Europe to receive them will occupy both ETOA and ETC into the future.

Tom Jenkins,
Executive Director ETOA

ETC MEMBER ORGANISATIONS

- **Austria**
Austrian National Tourist Office (ANTO) 
- **Belgium**
Flanders: Tourist Office for 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**
Ministry for Regional Development and 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

- ETC 86th **General Meeting**, Brussels on 30th January
- **Destination Europe 2020 Conference**, Brussels on 12th February
- ETC Press Conference at **ITB**, Berlin on 4th March
- 28th Annual Meeting of the **ETC Market Intelligence Group (MIG)**, Reykjavik on 12th – 15th March
- ETC at **WTM Latin America**, São Paulo on 23rd – 25th April
- ETC 87th **General Meeting**, Opatija, Croatia on 12th May

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