



# ETC BULLETIN

News from the European Travel Commission

May-August 2013

## CONTENTS

<b>About ETC</b>	<b>2</b>	<b>ETC research &amp; development</b>	<b>6-7</b>	<b>ETC agenda 2013</b>	<b>8</b>
<b>ETC marketing activities</b>	<b>3-5</b>	<ul style="list-style-type: none"> <li>• A strong response to the challenges posed by the global tourism market</li> <li>• Latest publications</li> <li>• Destination Europe 2020</li> </ul>		<b>List of ETC member organisations</b>	<b>8</b>
<ul style="list-style-type: none"> <li>• European tourism trade shows</li> <li>• TripAdvisor collaboration</li> <li>• Content syndication tool</li> <li>• New chair for Brazil OG</li> <li>• Euroshorts film competition</li> </ul>				<b>Contact details</b>	<b>8</b>

## European Travel Commission elects Manuel Butler as new President



Mr Manuel Butler, Director General of Turespaña (Spain) was elected President of the European Travel Commission (ETC) at the 84th General Meeting in Dublin (Ireland) on 11th April. Mr Manuel Butler succeeds Ms Petra Hedorfer of the German National Tourist Board (GNTB) for a three-year term.

Manuel Butler has been CEO of the Spanish Institute for Tourism since January 2012 and has acquired extensive experience in destination marketing over more than 25 years working in management positions, both in the public and the private sector, in Western Europe, North and Latin America.

“Europe is the world’s number one tourist destination. However, this leadership position should not be a reason for complacency. Europe has to contend with growing competition in the increasingly globalised international tourism market. In order to respond to this situation, the countries of Europe have to join

forces, share resources and ideas and develop joint marketing initiatives to promote the excellence and diversity of Europe” said Manuel Butler.

ETC has been responsible for marketing Europe overseas since its foundation in 1948. Today ETC has embarked, together with the European Commission, on the exciting initiative *Destination Europe 2020*, a programme designed to involve the entire tourism industry in defining a long-term strategy for Europe as a tourism destination. Under the leadership of Manuel Butler, ETC will continue supporting member NTOs in their portfolio of marketing and research activities in major long-haul markets with the aim of strengthening and increasing competitiveness of the travel brand Europe.

## ETC Presented Destination Europe 2020 at the Most Important European Tourism Trade Shows

The European Travel Commission (ETC) presented the *Destination Europe 2020* initiative to European and Latin-American media and stakeholders of the tourism industry during a press conference at FITUR in Madrid (Spain) and ITB in Berlin (Germany).

The XXIII edition of FITUR took place in Madrid between 30th January and 3rd February. This trade exhibition is a global meeting point for tourism professionals and the leading trade fair for inbound and outbound Ibero-American markets in Europe.

At ETC’s presentation, Peter De Wilde, ad interim President of ETC, introduced ETC’s objectives and activities to develop a strategy to position Destination Europe in long-haul markets. “This is not just a marketing strategy, it is an economic growth strategy at European level” said De Wilde.

*Continued on page 3*

# 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, Cyprus, Czech Republic, Denmark, Estonia, Finland, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain, Sweden.



**Others:** Croatia, Iceland, Monaco, Montenegro, Norway, San Marino, Serbia, Switzerland, Turkey.

## How Does ETC Work?

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, produces the New Media Trend Watch portal and organises an e-Business Academy once a year.

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 [visitoeurope.com](http://visitoeurope.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?



**Eduardo SANTANDER**  
Executive Director



**Valeria CROCE**  
Research & Development Manager



**Teodora MARINSKA**  
Finance, HR & Administration Manager



**Miguel GALLEGU**  
Marketing, PR & Communication Manager



**Annelies WAEGEMAN**  
Office Manager



**Stefanie GALLO**  
Project Manager Research & Development



**Jean-Francois SERPIETER**  
Online Marketing Manager

Our three interns are Alexandra Antonescu (VUB, Vrije Universiteit Brussel), Alexander Perry (Maastricht University) and Ana Vugrin (Faculty of Economics Ljubljana University).

## ETC MARKETING ACTIVITIES

# ETC Presented Destination Europe 2020 at the Most Important European Tourism Trade Shows

Continued from page 1

Eduardo Santander, Executive Director of ETC, presented the ongoing actions of the *Destination Europe 2020* initiative in Brazil, Canada, China and USA and highlighted the "real and optimistic message" that emerges from ETC's joint activities with the European Commission and UNWTO.

Manuel Butler, Director General of the Spanish Tourism Organisation (Turespaña), stressed the importance of tourism as a key to Europe's economic recovery and the valuable work of ETC and the European Commission to boost Destination Europe in emerging markets. Sandra Carvão, Chief of Communication at UNWTO, expressed support for initiatives aimed at promoting Europe in Asia and America and emphasised that international tourism organisations should join their efforts in order to obtain a better understanding of these emerging markets.

Finally, Pedro Ortún, Director of the Tourism Unit of DG Enterprise and Industry of the European Commission, set the objective of improving co-operation to promote Europe among the major outbound travel markets. According to Ortún, the best tool to achieve this goal is to work together, with greater involvement of the European tourism industry, especially of small and medium enterprises. It has also been recognised that policies facilitating tourism flows to Europe are essential to consolidate Europe as the world's number one destination in terms of sustainability, quality and diversity.

At the 47th edition of ITB Berlin, the European Travel Commission presented



From left to right: Sandra Carvão (UNWTO), Peter De Wilde (ETC), Pedro Ortún (EC) and Manuel Butler (Turespaña) at the Destination Europe 2020 presentation at FITUR 2013.

the latest figures on outbound tourism to Europe and reported progress in the ongoing marketing activities under the *Destination Europe 2020* initiative.

Eduardo Santander presented the final data about European tourism performance in 2012. According to UNWTO, Europe had 535 million international tourist arrivals in 2012, with Europe holding almost 52% of the market share of worldwide tourism. "Europe remains the world's number one tourist destination, but it is facing increasing global competition from emerging destinations" said Santander. "Europe must respond to these shifting patterns and capitalise on the potential of tomorrow's outbound travel markets, especially those from emerging economies whose expanding middle

classes are a growing market for European destinations" stressed Santander.

Stefanie Gallob, Project Manager Research & Development of ETC, highlighted current trends as well as new facts and figures about ETC's key long-haul markets with a special focus on the Chinese outbound travel market. "Total long-haul outbound from China is forecast to grow 8.3% per year on average through 2016 and Europe is at the top of their list regarding travel to foreign destinations. Without doubt, China has immense potential in the medium- and long-term for Europe."

Miguel Gallego, Marketing, PR and Communication Manager of ETC, presented the ongoing marketing activities of the *Destination Europe 2020* initiative. "ETC strongly believes that the successful promotion of Destination Europe relies upon the public and private industry in both Europe and in the various markets working together." In order to facilitate the gathering and sharing of knowledge, ETC invited all representatives of the tourism industry present at ITB to attend ETC's overseas conferences in São Paulo, New York City and Beijing. They were encouraged to participate in the Think Tanks that ETC is hosting in these markets.



From left to right: Stefanie Gallob (ETC), Eduardo Santander (ETC), Helena Egan (TripAdvisor) and Miguel Gallego (ETC) at ITB Berlin 2013.



## ETC MARKETING ACTIVITIES



Eduardo Santander (ETC) and Helena Egan (TripAdvisor) at ITB Berlin.

### The European Travel Commission Signs Collaboration Agreement with TripAdvisor

The European Travel Commission (ETC) signed, at ITB Berlin (Germany), an agreement to collaborate with TripAdvisor in market research and online activities.

The collaboration between ETC and TripAdvisor involves the sharing of market intelligence gathered from the world's largest travel site, as well as best practices in online travel marketing with the ETC's membership base of 33 National Tourist Organisations (NTOs).

The ETC sees this collaboration as a key factor in the implementation of the *Destination Europe 2020* initiative, a project designed together with the European Commission to incorporate the entire tourism industry in defining a long-term strategy for Europe as a tourist destination. "We are delighted to be partnering with the European Travel Commission as they launch *Destination Europe 2020*, with an emphasis on digital strategy" said Helena Egan, Head of Destination Marketing for Europe, Middle East and Africa, TripAdvisor.

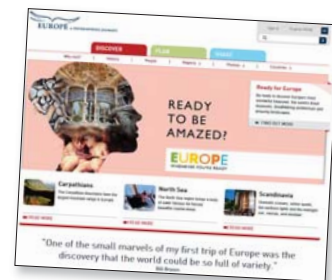
"The aim of this initiative is to position Europe as a tourist destination in the international markets with a clear brand image and to promote and support the NTOs in their overseas research and marketing activities" said Eduardo Santander, Executive Director of the European Travel Commission. "To achieve these goals, we must listen to what travellers are saying about our destination. We need up-to-date information about customer needs, expectations and satisfaction rates. We have to find out what Chinese tourists find so exciting about our continent and why they prefer to visit some countries rather than others".

### Pan-European Content Syndication Tool is Online

As part of the start-up actions of the *Destination Europe 2020* initiative, ETC has developed a Pan-European Content Syndication tool to distribute inspiring pan-European content available on the [visiturope.com](http://visiturope.com) portal.

The aim of this tool is to provide ETC's partners with state-of-the-art and accurate content without coding issues through an XML (Extensible Markup Language) feed, which will enable content to be aggregated and published on partner websites. XML feeds are readable on every platform, including mobile phones, tablets, and various operating systems.

The content includes practical and inspiring information about travelling in Europe in five different languages (English,



French, Spanish, Portuguese and Chinese) as well as photos and pictures and it is organised by regions, countries and themes. Everyone in the tourism industry, from online travel agents (OTAs) to travel bloggers, will have the opportunity to download the information they need, from ski resorts in the Alps to Mediterranean cuisine.

The Pan-European Content Syndication tool is available for free on [toolbox.visiturope.com](http://toolbox.visiturope.com). The only requirement to use the content is to mention its source "Content provided by Visiturope.com" with a deep link to [visiturope.com](http://visiturope.com).

The syndication work is designed to significantly increase visibility of content across the web and dramatically increase the number of visitors to [visiturope.com](http://visiturope.com) through links from external sites. The content syndication tool will make significant improvements to [visiturope.com](http://visiturope.com) and its scope for extending the content offer through different digital channels in the future, such as mobile and social media.

# Salvatore Constanzo Appointed Chairman of ETC's Brazil Operations Group

ENIT's Director for South America, Mr Salvatore Constanzo, has been appointed as new Chairman of ETC's Operations Group (OG) in Brazil. The appointment was officially announced last February during the last meeting of the Brazil OG in São Paulo.

Brazil is a rapidly growing outbound travel market. Thanks to increased social mobility including a growth in household incomes, easier access to credit, and attitudes that favour travel, the volume of outbound trips grew by 62% between 2000 and 2010. During the same period, expenditure of Brazilian travellers grew at a much faster rate of 325%. In 2011, they spent a record high of US\$ 21.3 billion on international travel with figures rising in 2012 by 4.6%<sup>1</sup>. In 2011, 7.9 million tourists travelled from Brazil. Of these, 2.6 million travelled within South America, while 5.3 million (67.3%) travelled to long haul destinations<sup>2</sup>. Europe attracted 55% of Brazilian total long-haul travellers (2.9 million).

The Brazil Operations Group will concentrate its marketing activity this year



From left to right: Elvira Marcos Salazar, Eduardo Santander, Salvatore Constanzo, Luis Fernando Destro, Adrien Genier, Margaret Grantham and Fernanda Morici Longobardo

at the trade show WTM Latin America, where ETC is exhibiting with its own booth for the first time. As part of the activities within the joint initiative *Destination Europe 2020*, ETC is organising a conference on the Brazilian Outbound Travel Market during WTM LA. In addition to this, a portfolio of

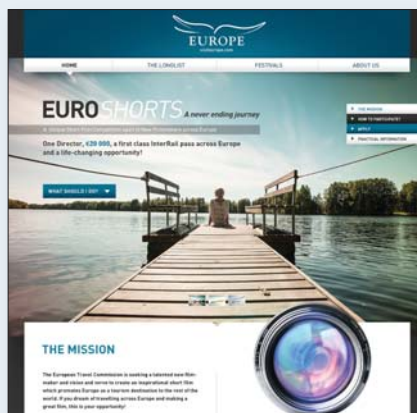
online marketing activities for the Brazilian market is planned.

<sup>1</sup> UNWTO World Tourism Barometer, January 2013  
<sup>2</sup> ETC (2013) European Tourism In 2012: Trends & Prospects Quarterly Report (Q4/2012).

## EuroShorts – A Unique Film Competition and a Life-Changing Opportunity

Since video is one of the most media-rich formats for engaging people, one of the marketing initiatives of the *Destination Europe 2020* programme is to focus on using the power of video as a major influencer for creating travel inspiration. The European Travel Commission has, therefore, launched a film competition with the aim of creating a new inspirational short film to promote Europe as a tourism destination.

ETC has invited young filmmakers to submit their proposals for a short film that captures the idea of *EUROPE – A Never-Ending Journey*. The finalist will have the opportunity to travel through Europe to turn the idea in to a three-minute short film which will be distributed worldwide.



A maximum budget of €20 000 is available to complete the project and all members of the team will be given a first class InterRail Global Pass for train travel within and between European countries. The Screen South cultural

development agency will provide executive producer assistance through a mentor who will help the finalist through the production process.

In the initial selection, 10 potential winners will be given the chance to promote their proposal online. Entries will then be reduced to a shortlist of five and invited to attend an interview in Brussels with a panel of experts including an Academy Award-winning filmmaker.

Shooting is expected to take place in July and August and the final-cut promotion video should be ready by the 23rd of September.

Please visit [www.euroshorts-films.com](http://www.euroshorts-films.com) for more information.

## ETC RESEARCH & DEVELOPMENT

# A Strong Response to the Challenges Posed by the Global Tourism Market

European tourism has performed vigorously in recent years, although long-term projections point to a slower growth of international arrivals when compared to other regions.

The European Travel Commission (ETC) announced a firm commitment to promote European destinations in overseas markets at the official opening of the *27th Annual Meeting of the ETC Market Intelligence Group (MIG)* in February 2013, an event that comprised the Research Directors of 33 National Tourism Organisations (NTOs) which are members of ETC.

Despite a turbulent economic environment, European tourism (+4%) demonstrated substantial growth in 2012, following a year of even stronger growth (+7%) in 2011. However, long-term projections point to a slow - but steady - decline in Europe's share of the global tourism market.

Challenged by the increasingly fierce competition of emerging destinations in long-haul markets, and by the persistence of an uncertain economic climate in its internal market, Europe needs bold actions to realise its growth potential. In this respect, the European Travel Commission recognises the significance of

research-driven, innovative marketing strategies to promote 'Destination Europe' in four key markets - US, Canada, Brazil and China.

Market intelligence has always played a prominent role in the portfolio of activities carried out by ETC and this is reflected in the new organisational structure. The Research and Development Department provides support to the ETC Executive Unit and to ETC members through the provision of core research, evidence-based conclusions and recommendations.

“Despite a turbulent economic environment, European tourism has demonstrated substantial growth”

The team work together closely with the ETC Market Intelligence Group (MIG) and Committee (MIC) to expand the scope and further enhance the quality of ETC research.

### Collaboration – The Key to Success

To ensure inter-organisational collaboration, ETC fosters its ties with the World Tourism Organization (UNWTO) and the European Commission (EC).

One of these occasions was the *27th Annual Meeting of the ETC Market Intelligence Group (MIG)* which was hosted by Visit Flanders and held in Brussels and Bruges (Flanders, Belgium) from the 20th – 23rd February 2013.

ETC was also honoured to welcome delegates from the European Spas Association (ESPA), the European Travel and Tourism Action Group (ETAG), the Organisation for Economic Co-operation and Development (OECD) and the World Travel & Tourism Council (WTTC). Being the core event in the group's calendar, this opportunity was used to cultivate knowledge exchange on emerging research topics and to discuss and agree upon the coming year's research programme.

## Destination Europe

### Research & Development Activities

*Destination Europe 2020* is an ambitious 18-month programme of activities which will be carried out by the European Travel Commission (ETC) with support of the European Commission (EC). The initiative is designed to involve the European tourism sector in defining a long-term strategy that will enhance the promotion of Europe as a tourism destination in four key markets (Brazil, Canada, China and USA). The programme also opens up additional opportunities in the field of research.

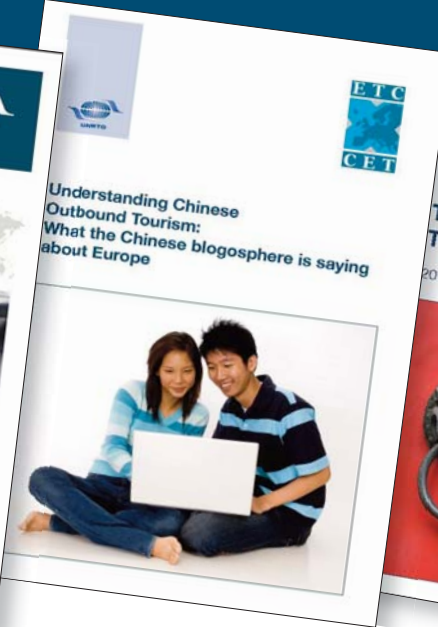
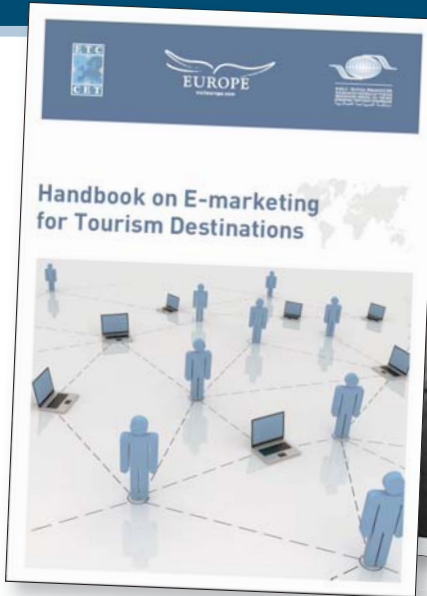
ETC's research agenda linked to *Destination Europe 2020* will cover the following areas:

- **Market insights:** produce a comprehensive overview of key facts and figures concerning the four markets of interest.



Opening ceremony of the 27th Annual Meeting of the ETC Market Intelligence Group in Brussels. Leslie Vella, Chairman of the Market Intelligence Group (MIG).





The 28th Annual Meeting of the ETC Market Intelligence Group (MIG) will be hosted by the Icelandic Tourism Board in Reykjavik, Iceland.

#### A New Approach in Market Research

In the past few years, new technologies have conquered everyday life, introducing opportunities but also posing challenges for tourism marketing organisations. The European Travel Commission (ETC) and the World Tourism Organization (UNWTO) will proudly present the second edition of the *Handbook on E-marketing for Tourism*

*Destinations* – fully revised and extended version 3.0 at an E-marketing Seminar in autumn 2013.

The handbook provides an overview of current practices in the field of e-marketing as well as practical information to develop e-marketing strategies in tourism using cutting edge technology. The seminar will build upon this basis by focusing on three main cornerstones: *social media, mobile marketing and key performance indicators (KPIs)*.

Through its innovative approach, the studies draw from the raw streams of opinion as expressed by millions of travellers, providing marketers with a unique opportunity to understand their potential clients in a way that only such modern research tools allow. Preceded by the report on China published in early 2013, *Understanding Chinese Outbound Tourism – What the Chinese blogosphere is saying about Europe*, ETC and UNWTO will publish an equivalent report on the young and dynamic Brazilian Outbound Travel Market in spring 2013.

It's not only marketing practices that need to be adapted in order to cater to the modern consumer, but also market research has identified new possibilities for exploring the minds of future travellers. In 2012, ETC commissioned a series of *netnographic* studies, exploring the image of Europe in select key markets as expressed in the blogosphere and on social media platforms.

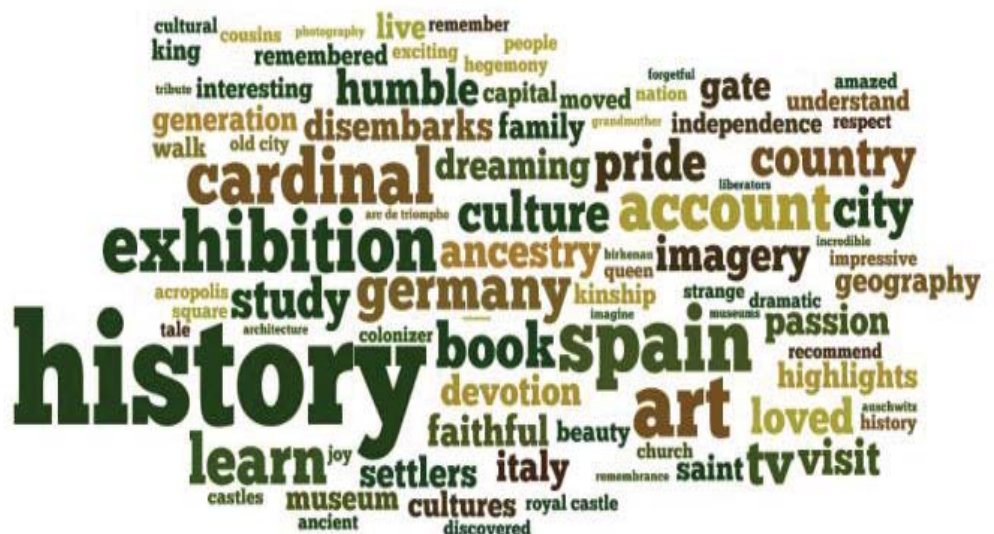
From the Southern Hemisphere to the North, two additional netnographic studies will focus on two markets in North America, notably the USA and Canada. Moreover, traditional market reports will be published or commissioned in 2013 in order to provide a detailed analysis of the US and Canadian outbound travel market.

## 2020

- **Performance evaluation:** ETC will monitor the performance of campaign activities related to the *Destination Europe 2020* programme, as well as assessing the competitiveness of European tourism compared to its main competitors.
- **Information dissemination:** improve access to the wealth of information produced by ETC through the development of an executive dashboard.



This ambitious research programme will be realised by the ETC Executive Unit in close collaboration with the European Commission and with the support of the ETC Market Intelligence Group.

The aim is to capitalise on the opportunities offered by this programme to maximise the outcome of the ETC research agenda and set a solid basis for the success of its new long-term strategy.



Word cloud indicating the words that are most characteristic of a historical theme in the discussion about Europe in Brazilian microblogs. *The Brazilian Outbound Travel Market: a blogosphere analysis (in progress) 2013.*

## 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**  
Agenzia Nazionale del Turismo 
- **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 2013

- ETC 84th **General Meeting**, Dublin on 11th April
- ETC at **WTM Latin America**, São Paulo on 23rd-35th April
- ETC Conference **Descubra Europa**, São Paulo on 24th April
- ETC **Transatlantic Conference**, New York City on 9th May
- ETC/UNWTO **E-Marketing Seminar**, Autumn 2013
- ETC **China Conference**, Beijing (tbc)

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