



ANNUAL REPORT 2021

**EUROPEAN
TRAVEL
COMMISSION**

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EUROPEAN TRAVEL COMMISSION

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PRESIDENT'S FOREWORD

Two years of the global pandemic promptly followed by the Ukrainian-Russian conflict has left tourism across Europe facing difficult challenges to address.

As an international organisation with over 70 years of history, we understand the geopolitical challenges well; but we also know that tourism is a force for good, a catalyst for peace and understanding. We see the opportunity to capitalise on this fragile momentum, speak with one voice, and ensure that our key messages, supported by the industry, are heard.

Firstly, we need to establish a harmonised and coordinated response to these crises, always defending the Schengen integrity as well as established agreements with third countries. European tourism simply cannot afford to have inconsistent and ever-changing national approaches when facing challenges. Fragmentation is unhelpful and should be urgently and collectively replaced by comprehensive cost-efficient coordinated measures.

Secondly, tourism must be firmly anchored in the recovery and resilience plans of all European States. Investing in tourism provides long-term benefits to communities, visitors, and businesses throughout Europe. We urgently need to help tourism micro-enterprises and SMEs, family-run businesses – the backbone representing more than 80% of the industry – to easily access the necessary funding allowing their survival, and help rebuild their activity in a digitally and environmentally friendly way with a clear focus on people: tourists, locals and workers. It is also critical to support destinations by increasing their budgets for product development and promotion to attract more intra-EU travellers in short/medium-term and long-haul visitors diversifying source markets.

Finally, even though triggered by crisis scenarios, we have a real chance to move towards the tourism sector of tomorrow. It is high time now to challenge old models and reinvent the sector, accelerating the transformation to sustainable, digital, and innovative tourism. It is vital for this process to define ambitious targets and create action plans. Our goal is to promote European tourism as the key element to regenerate our countries and increase Europe's global competitiveness as a touristic destination.



ETC and its NTO members, together with our associates and partners, are arguing strongly for this.

ETC stands ready to work with the EU Institutions, European governments, and all stakeholders to overcome present challenges and pave the way for the responsible, sustainable, and innovative tourism ecosystem of tomorrow.

There is a big political prize if we can seize it: when managed well, tourism is one of the best engines for transformative and sustainable economic development, and it will need political leadership and support. We look forward to working on this vital effort in the years ahead.

Yours sincerely,

Luis Araujo

President of the European Travel Commission

MESSAGE FROM ETC EXECUTIVE DIRECTOR

The year 2021 will be remembered as a critical one for tourism in Europe and beyond.

As an international organisation ETC had to react accordingly, and so we did. We responded to the crisis by supporting our NTO members, associates, and partners in every way we could.

For the first time in our organisation's history, we built an action plan focusing on the intra-European market to respond to last-minute demand from neighbouring and domestic tourism. This was done by maintaining our presence in major third markets (US, Canada, China, and Brazil) and even expanding our overseas chapters to Japan and Australia. Moreover, we shifted our marketing efforts to reinforce the image of Europe as a travel destination, supporting messages of safety and responsibility.

Although market intelligence has always been pivotal to ETC, it became essential in times when trusted information was needed to rearrange strategies, budgets, and plans. Webinars were run on demand and we reinforced our insight hub with members to share our most valuable assets: information, benchmark, and best practice.

ETC also became an essential player for the European Institutions monitoring the situation both on the European level and nationally. Throughout the crisis and still today, ETC has been advocating for transparency, coordination, and harmonisation. Together with the European Commission, we run a unique COVID-19 information network with other EU associations which became instrumental to cutting edge actions at the European level, such as the development of the EU Digital COVID Certificate and the Re-Open EU website.

Internally, we re-organised our focus on our members' immediate needs. We lead by example, travelling and gathering physically again as soon as it was possible. ETC became more adaptable and flexible to face future crises. To that extent, we started working on a new resilient strategy for the organisation towards 2030. ETC is well placed to serve its members and the industry when the recovery comes.

On a personal note, this year has taught me that no matter how fast things might change, we need to get



up every day and continue to stay positive and work towards solutions. We all live on borrowed time, things can change in a split second and suddenly everything is different – hence, let us work towards a more meaningful tourism, with open eyes into a hopeful future.

A big token of appreciation goes to the ETC President, Vice Presidents and members of the Board of Directors and General Meeting, for their guidance, trust, and confidence.

My last reflection goes to my invaluable team at the Executive Unit. What we become and what we will be remembered for is entirely up to us. Hard work does pay off. Let us remain humble, tolerant, and understanding, and spread the art of etiquette, behaviour, and respect. Ultimately that is what tourism is all about. Thank you for your great work.

Yours sincerely,

Eduardo Santander

ETC Executive Director

ETC EXECUTIVE UNIT

The Executive Unit¹ is based in Brussels and operates in the following fields – Marketing and Communication, Public Affairs, Research, Partnerships, Finance and Administration.

Every year, ETC includes trainees – students with a strong background in tourism who were given the unique opportunity to gain work experience along with a privileged insight into European tourism.

The Executive Unit works on basic principles of integrity, respect, teamwork, and adaptability to dynamic environments.

The Executive Unit is proud to include staff members and trainees from eight different countries – Bulgaria, Cyprus, Finland, Portugal, Romania, Russia, Spain and the UK.



Teodora Marinska
Head of Finance
and Public Affairs



Miguel Gallego
Head of Marketing
and Communication



Jennifer Iduh
Head of Research



Iulia Niculică
Funding, Procurement
and Development Manager



Lyublena Dimova
Research Manager



Tatiana Veselova
Corporate Communications
and Public Affairs Manager



Anna Bellmàs
Project Manager Marketing



James Arnold
Project Manager Research



Diogo Paciência
Digital Marketing Manager



Sophia Westerlund
Administration Manager



Anahid Heron
Advocacy Trainee

¹ Updated according to current structure at the date of publication in May 2022.

EUROPEAN TOURISM TRENDS & PROSPECTS

PERFORMANCE 2021 & OUTLOOK 2022

Tourism's decade-long boom was brought to a complete halt following the COVID-19 outbreak in early 2020. The turbulence brought by the global pandemic changed people's lives in unprecedented ways; the way they live, work, learn, interact, and travel, and it has determined the course of the wider tourism economy. The year 2021 was expected to be the year of steady tourism recovery, helped by strong vaccination coverage in Europe, the EU Digital COVID Certificate, and the easing of travel restrictions which enabled the release of large pent-up demand and drove a strong summer season. However, the emergence of new variants caused the reimposition of travel restrictions and lockdowns, and pushed back expectations of any meaningful recovery in global travel.

Recent data shows that international tourist arrivals to Europe decreased 62%¹ in 2021 over 2019 volumes. On the other hand, due to ongoing travel restrictions to limit the spread of COVID-19, Travel and Tourism's worldwide economic contribution was 39.6% lower than pre-pandemic levels in 2021 and the total contribution of Travel and Tourism to Employment in the same year was down 13.2%. The most recent World Economic Outlook (WEO) data anticipates that global growth will shrink from 5.9% in 2021 to 4.4% in 2022.

IMPACT OF TOURISM ON THE WORLD ECONOMY IN 2021 (total contribution)

5,812 billion USD

289 million jobs

6.1%

of total world GDP

9.1%

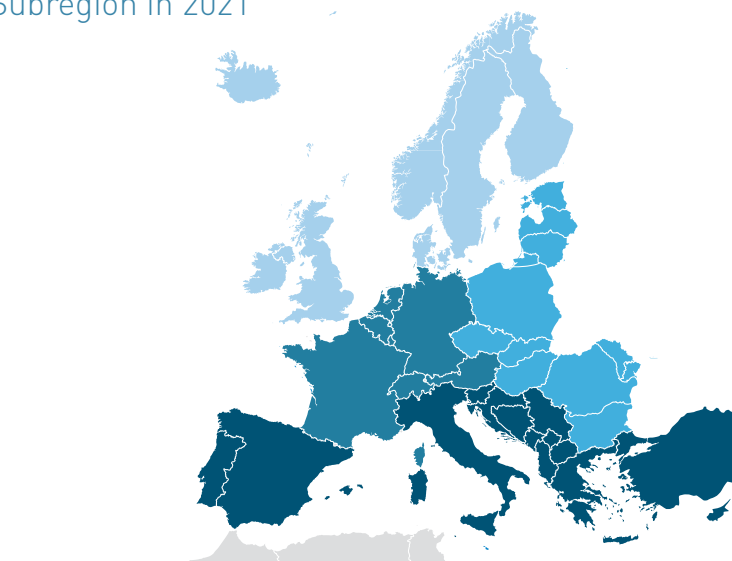
of total world employment

Decline in international tourist arrivals in 2021 [% YTD on 2019]

-62.3% Europe

-71.3% World

International Tourist Arrivals by European Subregion in 2021



- Southern/Mediterranean Europe **138.3 million**
- Central/Eastern Europe **55.2 million**
- Western Europe **71.8 million**
- Northern Europe **16.1 million**

Sources: UNWTO & WTTC

¹ UN World Tourism Organization (UNWTO)



The global health crisis kept long-haul travel to a bare minimum for the last two years. However, the travel resumption between Europe and the United States in November 2021 is expected to help drive European tourism recovery in 2022. The positive performance of the US market will be boosted by consumer demand, mainly owing to increased household savings and spending, and strong pent-up demand for travel over the last two years. Meanwhile, China's prolonged "Zero COVID" policy, which is expected to remain for much of 2022, continues to weigh on global travel.

Despite being two years into the pandemic, there remains a high degree of uncertainty due to the potential emergence of new variants prompting governments to tighten entry rules, uncoordinated and changing travel regulations across the EU, the Russia-Ukraine war, and the significant inflationary pressure affecting the health of the global economy. Although the economic and tourism recovery is expected to continue in 2022, the downside risks have the potential to downgrade growth prospects.

Overall, the outlook for Europe is positive, with travel demand expected to remain 30% below pre-pandemic levels in 2022, mainly supported by domestic and intra-European travel demand. While domestic travel is expected to exceed pre-pandemic volumes in 2022, international travel is not projected to achieve this until 2025. Recent ETC data on intra-European travel shows that 77%² of Europeans remain optimistic about travelling between April-September 2022, which demonstrates the continuous resilience in spite of the pandemic and the Russo-Ukrainian war. The same study also indicates a strong preference for Mediterranean destinations, with Spain featured as the most favoured destination, followed by Italy, France, and Greece.

In 2022, COVID-19 protocols will be key to ensuring travel's safe and fast return, although it remains to be seen to what extent these protocols (e.g. face masks, social distancing,

² ETC Monitoring Sentiment for Intra-European Travel, Wave 11

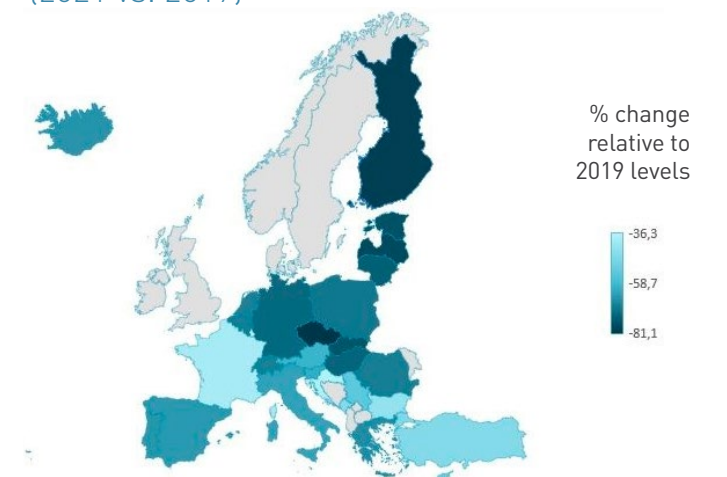
testing and tracing measures, health passports, vaccine boosters, and extra hygiene) are likely to remain part of the travel journey in the years to come.

Throughout 2022, the different issues of the European Tourism Trends & Prospects (Quarterly Reports) will continue to monitor tourism recovery in the midst of the COVID-19 pandemic, current geopolitical conflicts and the health of the macroeconomic environment. The reports are complemented by a wide range of industry intelligence and include data from the [TourMIS database](#), [UNWTO](#), [STR](#), [Transparent](#), [IATA](#), [Eurocontrol](#) and [ForwardKeys](#), with economic analysis and forecasts from [Tourism Economics](#). The publications are supported by a wide range of visually appealing and user-friendly dissemination materials that summarise the report findings, such as infographics, videos, summary slides, etc.



Check them out on the [ETC corporate website](#) and share!

Foreign Visits to European Destinations (2021 vs. 2019)



Sources: ETC & TourMIS

ETC MARKET INTELLIGENCE GROUP

MEMBERSHIP

The Market Intelligence Group (MIG) brings together the Research Directors of ETC's 34 member National Tourism Organisations (NTOs). An essential event in the calendar of the MIG is the group's Annual Meeting, with the aim of establishing new research programmes for the upcoming year.



6th MARKET INTELLIGENCE GROUP (MIG) AND MARKETING GROUP (MKG) ANNUAL MEETING

The 6th Market Intelligence Group (MIG) & Marketing Group (MKG) Annual Meeting took place virtually on 28-30 April 2021. The meeting gathered Research and Marketing Directors of ETC member countries. Delegates from the [World Tourism Organization \(UNWTO\)](#), [Google](#), [Expedia](#), [CrowdRiff](#), [MyTravelResearch](#) and [TEAM Tourism](#) were also present. The meeting offered ETC members a chance to learn and exchange knowledge and expertise on the latest trends in research and marketing in tourism.



EVENTS & WEBINAR CALENDAR 2021

- ETC Webinar – European Tourism Trends & Prospects – **January, April, June, and October**
- MIC Meetings – **April, June, September, and December**
- ETC Webinar – Moving Beyond Sustainability: Regenerative Tourism from Strategy to Practice – **March**
- 6th Market Intelligence Group (MIG) and Marketing Group (MKG) Annual Meeting – **April**
- ETC Webinar – Behavior-Smart Thinking for Tourism Destinations – **May**
- ETC Webinar – ETC-ForwardKeys Summer Outlook – **June**
- ETC Webinar – Step-By-Step Framework for Sustainable Tourism – **June**
- TourMIS Users' Workshop and International Seminar on Consumer Trends and Changes in Travel – **September**
- ETC Webinar – Encouraging Sustainable Tourism Practices – **October**
- ETC Webinar – Mapping Visitors' Experience in the COVID Era – **December**



THE MARKET INTELLIGENCE GROUP (MIG) IN 2021

- **Chairperson:** Sérgio Guerreiro (Portugal)
- **Vice-Chairperson:** Nessa Skehan (Ireland); Tania Sultana (Malta)
- **Co-ordinators:** Jennifer Iduh (ETC Executive Unit); Lyublena Dimova (ETC Executive Unit); James Arnold (ETC Executive Unit)

MARKET INTELLIGENCE COMMITTEE IN 2021

- Steven Valcke (Belgium - Flanders)
- Saša Popovac (Croatia)
- Dijana Radic Milosevic (Denmark)
- Bert Reila (Estonia)
- Elisabeth Ebon Niinepuu (Estonia)
- Matthias Hickl (Germany)
- Nessa Skehan (Ireland)
- Tania Sultana (Malta)
- Marieke Politiek (the Netherlands)
- Patrícia Seguro (Portugal)
- Sérgio Guerreiro (Portugal)
- Ana Špik (Slovenia)
- Barbara Zmrzlikar (Slovenia)
- Álvaro Blanco Volmer (Spain)
- Julio López Astor (Spain)

PARTNERS

- ETOA – Tim Fairhurst
- UNWTO – Michel Julian

MIC MEETINGS

The Market Intelligence Committee (MIC) comprises a group of volunteers from the research departments of 11 ETC NTO members. The MIC gathers four times a year and all meetings in 2021 were held via teleconferencing.



MONITORING TRAVEL SENTIMENT IN KEY OVERSEAS MARKETS REMAINED IMPORTANT AMIDST THE PANDEMIC

In 2021, ETC released three Long-Haul Travel Barometers (LHTBs), which provided forward-looking insights about the travel plans of holidaymakers in Brazil, Canada, China, Japan, Russia and the US. The LHTBs measure people's intentions to embark on long-haul trips and analyse the factors that have boosted or hampered their travel plans. The barometers also monitored each market's changing preferences for destinations, travel periods, and preferred transportation modes within a destination.

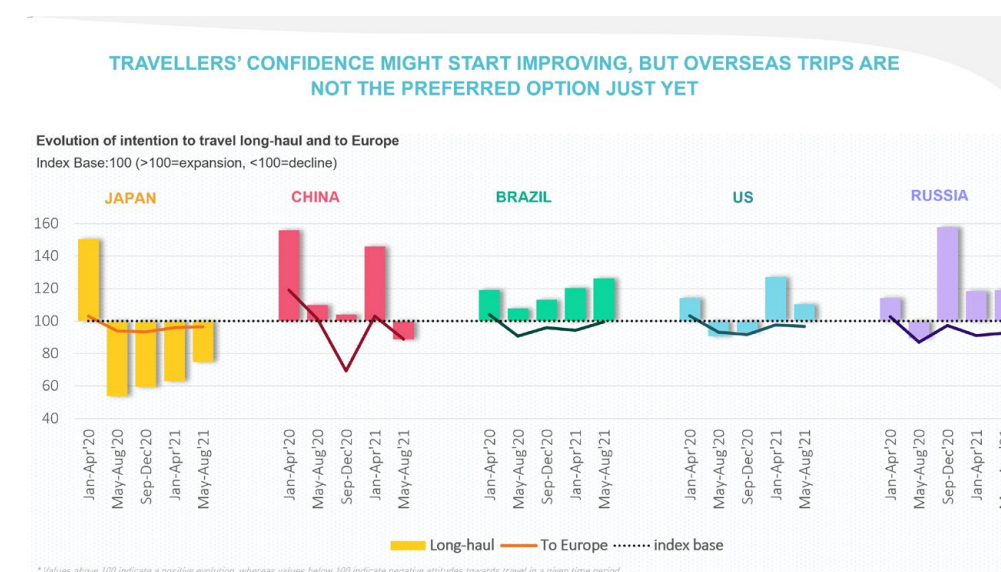
Early year results indicated a slight revitalisation in respondents' overseas travel intentions. However, as Europe's entry bans were widely in place during the first four months of 2021, it was unsurprising that travellers' confidence in visiting Europe between January and April 2021 remained low. Fear of exposure to COVID-19 was a major deterrent to international travel, especially among Chinese respondents, while the volatile economic environment was more evidently affecting Russian and Brazilian travel plans.

As summer approached, the easing of pandemic restrictions boosted people's hopes to travel. However, the confidence for trips overseas remained weak, mainly due to the lack of pragmatic mechanisms for intercontinental travel to Europe and other world regions. Among the analysed markets, the US and Brazil demonstrated a stronger optimism to visit Europe between May and August 2021.

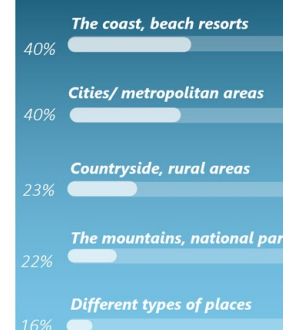
The situation did not improve much in autumn 2021 with the upsurge in COVID-19 cases, the reintroduction of entry bans to US travellers, China remaining closed for travel, and the lack of vaccine approvals from other world regions by the European Medicines Agency. However, improved vaccination rates across the globe drove a greater appetite to visit Europe in autumn 2021 compared to 2020.



The [Long-Haul Travel Barometers](#) were launched in partnership with [Eurail BV](#) and the [European Commission](#).



Preferred type of destination to visit



US respondents

Travel horizon January-April 2021

EUROPEANS' TRAVEL SENTIMENT MAINTAINED STRONG RESILIENCE DESPITE ONGOING THREATS OF COVID-19 IN 2021

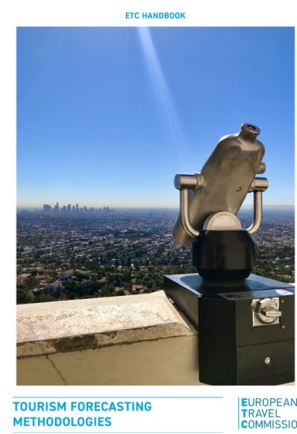
Given the increasing importance of regional travel for the recovery of European tourism, ETC continued publishing regular insights about European residents' travel sentiment. In 2021, [six reports](#) were published by ETC, with insights from residents in Germany, the United Kingdom, France, the Netherlands, Italy, Belgium, Switzerland, Spain, Poland, and Austria.

The reports provided the necessary intelligence to better understand people's drivers and fears related to travel, destination, accommodation and transportation preferences, sought experiences, etc.

The survey results disclosed that Europeans were more cautious about travelling during the first months of 2021. However, as soon as the vaccine rollout began and the European Union approved the implementation of the EU Digital COVID Certificate, things took a positive turn. Europeans' travel sentiment maintained strong resilience, reaching a peak in spring, with 70% of respondents anticipating travel during May-November 2021. Over this period, the interest in domestic travel declined, while respondents' desire for intra-European travel gained momentum.



Preferred type of leisure trip for respondents most likely to travel in the next 6 months



SUPPORTING DESTINATIONS IN TOURISM FORECASTING FOR BETTER DESTINATION MANAGEMENT

Predicting tourism demand can provide indications for implementing targeted marketing and promotional campaigns, managing tourist flows or addressing sustainability concerns. These efforts can ultimately result in better decision-making, improved productivity, and increased satisfaction for both travellers and locals. The primary goal of forecasting is to predict the future, which may seem an easy task when events are regular and follow simple patterns. However, in the tourism sector, travel demand can still be a difficult variable to predict given the number of external factors that are involved (e.g. health of the economy, pandemics, natural disasters, terror attacks, fuel prices, geopolitical environment, etc.).

The ETC Handbook on Tourism Forecasting Methodologies was developed as a simple guide to the complex world of tourism forecasting and provides National Tourism Organisations (NTOs) and Destination Management Organisations (DMOs) with the necessary guidance, practical tools and up-to-date techniques for effective tourism forecasting. More specifically, the handbook serves as a user-friendly tool for understanding the forecasting process, practices, methods, and analysis in the field of tourism.



The [handbook](#) also briefly discusses the required resources to support forecasting methodologies such as systems, programmes and skills, etc., and includes successful case studies of forecasting practices in the travel and tourism sector. The handbook supplement (Case Studies) is available in a separate document and upon request from the European Travel Commission.

EXPLORING THE CONNECTION BETWEEN THE CHANGING TOURISM ENVIRONMENT AND THE WORK OF NATIONAL TOURISM ORGANISATIONS

In response to the accelerating demand for travel prior to the COVID-19 pandemic, the rapidly transforming tourism environment and in search of long-term success, National Tourism Organisations (NTOs) have started challenging their traditional roles and are striving to reinvent themselves and tourism in their destinations. Forward-looking approaches have been designed to ensure a tourism development that is economically, socially, and environmentally sustainable.

To capture this critical moment of transition, ETC prepared a comprehensive [report](#), which investigates how both European and non-European NTOs have been evolving over the past decade and provides forward-looking insights and recommendations for achieving sustainable tourism development.

In addition, ETC also produced a short complimentary report reflecting on "Stakeholders' Perspectives". This report summarises the views of 19 CEOs of NTOs and international tourism organisations on key tourism themes and topics. The report also concludes with the priorities and building blocks for a European NTO prepared for future changes in the tourism environment.



EUROPEANS ARE EAGER TO WELCOME BACK TOURISTS AND SUPPORT HOST COMMUNITIES WHILE TRAVELLING

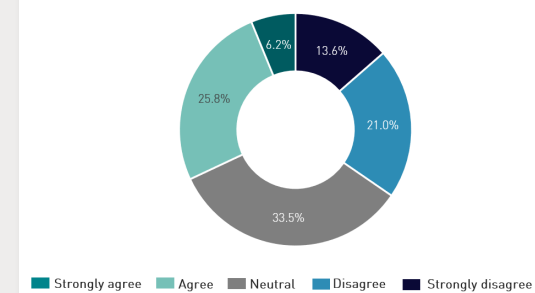
ETC, in partnership with [MINDHAUS](#), has released the report "Europeans' Attitudes Towards Responsible Travel Choices", which examines the impact of the COVID-19 pandemic on Europeans' responsible travel choices. The report reveals European residents' opinions regarding the importance of sustainability for their travel experiences, seasonal and destination preferences, travel frequency, in-destination travel behaviour, and eagerness to welcome tourists, etc.

The [report](#) discloses interesting trends, such as the increasing interest in off-peak travel, fewer trips and longer stays, growing enthusiasm from host communities to welcome back tourists, growing recognition of tourism's economic and social importance, and readiness to spend more for services and products that support host communities.

This project is co-funded by the European Union.

1 in 3 respondents would be willing to pay more for visiting a less crowded destination following the pandemic

Willingness to pay more for less crowded destinations and attractions



TAKING ACTION: PRACTICAL GUIDANCE FOR SUSTAINABLE TOURISM IMPLEMENTATION



This [handbook](#) is aimed at European National Tourism Organisations (NTOs), and its ultimate goal is to support efforts to build national tourism strategies that advance sustainable tourism. To complement this handbook, a [toolkit of practical resources](#) has been developed to assist NTOs with the implementation of sustainable tourism schemes.

While the tourism industry is still recovering from the COVID-19 crisis which left the sector in a state of shock, it is imperative that destinations make efforts to integrate sustainability into their national strategies and ensure that this goes beyond tokenism, to make a real and tangible difference at all levels.

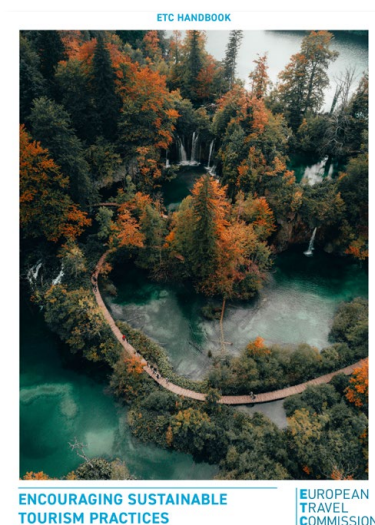
Across Europe, there are a number of remarkable examples of destinations implementing country-based approaches to drive sustainable tourism. However, some destinations are still at the stage of establishing their goals in the area of sustainability, while many do not yet acknowledge it as an integral part of their tourism strategies. To support destinations on their sustainable journey, ETC commissioned the “Handbook on Sustainable Tourism Implementation: Framework and Toolkit”, which presents a seven-step framework that provides practical insights and guidance for the implementation and development of a sustainable tourism scheme in Europe. The framework is constructed as a modular approach towards sustainable tourism development on a national level, whereby each of the seven steps is broken down into practical instructions for facilitating sustainable tourism while also guiding the reader through the challenges of a sustainable transition.

FOSTERING SUSTAINABILITY THROUGH KNOWLEDGE AND BEST PRACTICE SHARING

While the COVID-19 pandemic has left worldwide tourism facing a crisis like no other, it has also provided an opportunity to rebuild the sector in a more economically, socially, and environmentally viable manner through the implementation of more sustainable models. A fundamental part of the efforts to rebuild the sector is ensuring the tourism sector can contribute even more positively to society, its economy, and reduce its negative environmental impact.

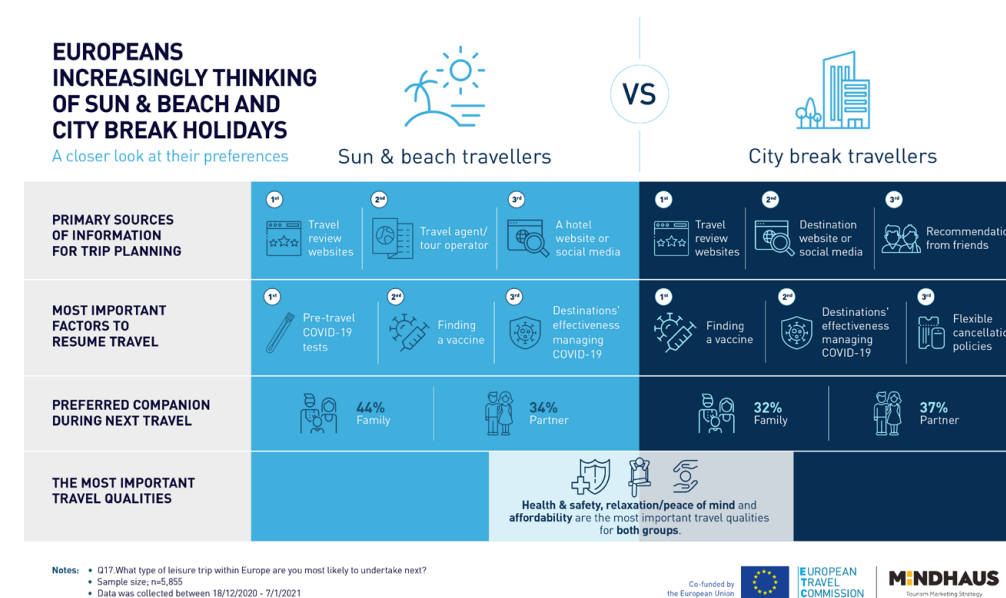
Information and knowledge sharing among destinations have therefore become essential approaches in mitigating the social and economic impacts of the pandemic on the tourism sector. In this regard, through the production of the ETC Handbook on Encouraging Sustainable Tourism Practices, the organisation took the lead in gathering successful tourism cases from different entities and destinations worldwide that encourage sustainable tourism practices among consumers and the industry.

This [handbook](#) contains valuable case studies that have successfully forged more economically, socially and environmentally viable tourism practices over the past years. The 20 case studies included in the handbook highlight the ways in which European and other worldwide destinations are embedding sustainable approaches into their travel and tourism sector, along with key takeaways for National Tourism Organisations (NTOs) and Destination Management Organisations (DMOs).

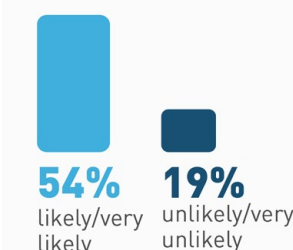


DISSEMINATION ACTIVITIES

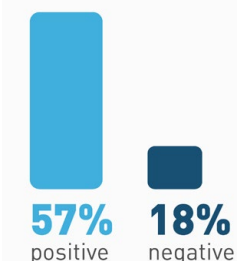
The adequate dissemination of ETC's market intelligence has become a priority of the organisation over the last years. Research insights have been transformed into infographics and quick take videos, to provide easily digestible insights for European NTOs and the wider tourism sector. The ETC Dashboard also allows members to access statistics, data, studies, and other information relevant to monitoring tourism in Europe and from select source markets.



Travel intention after COVID-19 vaccination



Sentiment towards EU Digital Covid Certificate



INDUSTRY PARTNERS



TRANSPARENT - SHORT-TERM RENTALS

ETC has partnered with [Transparent](#) for a benchmarking project to monitor short-term rental listings and key metrics for both supply and demand in each ETC member country from the four main online travel agents in the short-term rentals sector: Airbnb, Booking.com, HomeAway, and TripAdvisor.



FORWARDKEYS - AIR BOOKINGS

[ForwardKeys](#) provides ETC members with a monthly summary monitoring flight bookings to Europe from different regions of origin compared to pre-pandemic levels.



TCI RESEARCH - TRAVEL SENTIMENT

[TCI Research](#) provides ETC members with near real-time data designed for monitoring destination experiences from rating and reviews data as well as perceived sanitary safety levels.

MARKETING ACTIVITIES

MARKETING GROUP

- **Chair:** Elke Dens, Belgium-Flanders / Heili Klandorf-Järvisoo, Estonia
- **Vice-Chair:** Maria Elena Rossi, Italy
- **Co-ordinators:** Miguel Gallego, ETC Executive Unit



CO-BRANDING PROMOTIONAL CAMPAIGNS BY THE JOINT PROMOTION PLATFORM



ETC carried out a series of seven co-branding promotional campaigns in cooperation with 87 European partner destinations and travel brands to leverage resources for the joint promotion of Europe in third markets.

ETC delivered three co-branding campaigns under the Nature and Outdoors theme in partnership with the NTOs of Finland, Denmark, Sweden, Serbia and Montenegro, and several Irish DMOs. These campaigns engaged almost 10 million travel intenders contributing to raising awareness of slow adventure experiences in Europe in China, Canada, and the USA.

ETC also implemented a co-branding promotional campaign with the NTOs of Germany and Flanders under the Creative Cities passion point. This campaign which reached almost 9.8 million impressions, promoted European culture, art, and a vibrant lifestyle to Chinese and North American travellers.

ETC also delivered two multi-thematic campaigns targeted at the Chinese market. The “Wanderlust Wonder Europe”

campaign brought together 35 DMOs to increase awareness of extraordinary travel experiences in European destinations under the Nature & Outdoors and Creative Cities passion points. More than 500 article posts were created and published on WeChat, Weibo, and Douyin. Over 60 Chinese influencers were engaged during the campaign, with their content reaching a total of 165 million page views. The campaign “Europe Behind the Scenes” in partnership with 9 DMOs saw the creation and distribution of a mini-series of videos with local correspondents presenting authentic stories and experiences in Europe, and in combination with social media promotion and a series of live streams amounted to over 33 million views.

These campaigns were co-funded by the European Union.

EUROPE INVITES THE CURIOUS



The consumer communication campaign “Europe invites the curious” contributed to keeping Europe top of mind among travel intenders from long-haul markets. The 10-month campaign, co-funded by the European Union, mainly ran organically on ETC’s global digital and social media channels.

The paid digital activity was activated in the United States during the summer, following the US inclusion into the list of countries from which non-essential travel to the EU should be allowed. It also “set the tone” for promotional campaigns by individual European destinations on the market that followed shortly after. The campaign received 20,5 million online impressions and reached 6

million US consumers. It generated an addressable data pool of over 4,2 million consumers for future campaigns. Consumers who were exposed to the campaign performed 145,000 flight and hotel searches, which translated into 5,500 bookings and over 8,000 travellers. The campaign generated an attributed hotel revenue of over EUR 1,2 million.

OPEN UP TO EUROPE



The campaign delivered almost 185 million impressions and reached over 80 million consumers. It succeeded in stimulating pent-up demand accounting for nearly 4,4 million flight and hotel searches, about 159,000 bookings, and over EUR 40 million in hotel revenue.

The “Open up to Europe” campaign played a significant role in reopening European tourism and the revival of travel confidence in the summer season. The campaign was led by ETC and co-funded by the European Union with the support of more than 30 destinations and travel brands in an unprecedented joint public and private effort. It was the first-ever consumer campaign by ETC targeted towards travellers in 14 European markets.

The multi-channel campaign reassured Europeans that destinations and tourism businesses across the continent were open again following the easing of restrictions imposed by the COVID-19 pandemic. It also encouraged consumers to travel more responsibly and sustainably.

The microsite OpenUpToEurope.eu offered regular updates and advice about how to travel in Europe, including information about the EU Digital COVID Certificate and the European Tourism Covid-19 Safety Seal. It also included practical tips about experiences consumers could enjoy in Europe, focusing on nature, culture, and gastronomy. ETC renewed its partnership with Euronews, which aired the campaign spot on TV and its digital platforms throughout the summer.

OVERSEAS CHAPTERS

NEW CHAPTERS AND CHAIRMANSHIPS

ETC re-established its Overseas Chapters in Australia and Japan to provide its members with a platform to share market intelligence and collectively contribute to rebuilding confidence in travel to Europe amidst the COVID-19 pandemic. The Chapters also provided input for implementing the global communication campaign “Europe invites the curious” in line with ETC’s strategy Horizon 2022.

Sofia Hanson (Tourism Ireland) and Livio Goezt (Switzerland Tourism) were appointed as Chair and Vice-Chair, respectively, of the Australia Chapter. Koichi Numata (Visit Finland) was elected as Chair of the Japan Chapter.

In China, a new team comprised of Franka Gulin (Croatian National Tourist Board) as Chair and Tiago Brito (Visit Portugal) and David Wu (Visit Finland) as Vice-Chairs was entrusted to lead the activities of the Chapter.

10 YEARS OF ETC IN CHINA

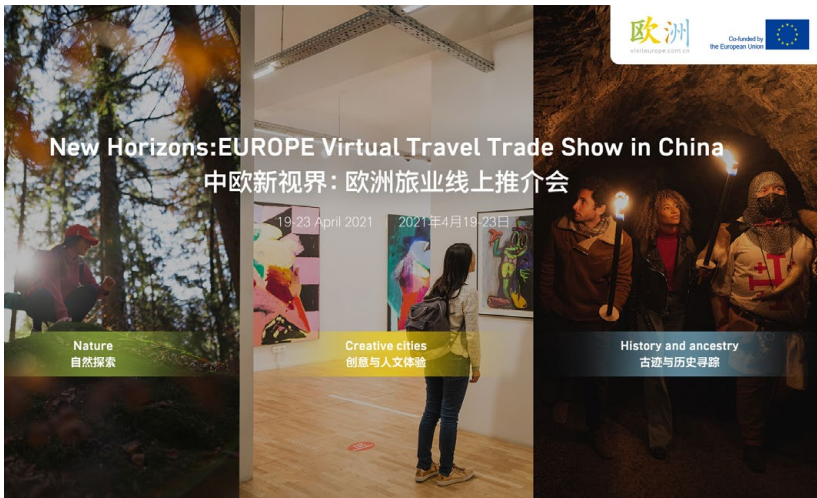
The ETC China Chapter marked its 10th anniversary with a celebratory evening reception. The event brought together ETC Members with more than 70 representatives of the wider travel industry, airlines, media, and famous travel influencers. The reception reflected on the ETC-Sino relationship over the past decade and looked forward to welcoming Chinese travellers to the old continent again.



Members celebrated 10 years of ETC presence in China

CHINA-EUROPE VIRTUAL TRADE SHOW

ETC held the first Europe Virtual Travel Trade Show in China on 19-23 April 2021, bringing together 126 European destinations and their local suppliers with 274 pre-qualified Chinese buyers for one-on-one meetings to start planning the revival of travel between China and Europe. The entirely virtual B2B event featured industry experts from China and Europe who discussed the future of tourism. In addition to the matchmaking meetings, destinations participated in a virtual exhibition, where they could share brochures, videos, and other practical information with trade visitors from their virtual booths. The virtual trade show was co-funded by the European Union.



TRADE REASSURANCE CAMPAIGN IN NORTH AMERICA



ETC carried out a reassurance campaign in North America during spring 2021 to restore trade confidence in travel to Europe while reinforcing Europe’s unique image as a desirable travel destination for American travellers. The campaign was co-funded by the European Union.

The elements of the USA section of the campaign included a landing page on Travel Agent Central and a series of native and video ads, newsletters, and webinars that highlighted Europe’s tourism industry’s commitment to health and safety protocols while simultaneously showcasing the Europe brand via inspiring experiences around the passion points of History and Ancestry, Creative Cities, and Nature and the Outdoors. The campaign wrapped up with a virtual event on 30 June 2021.



In Canada, travel advisors and operators were able to receive the latest updates on travel requirements and health and safety protocols across Europe thanks to the campaign, whose elements included a landing page hosting a series of articles focusing on Nature and Outdoors, Creative Cities, History, and Ancestry experiences as well as sustainable train travel. Other tactics included email marketing, newsletters, and a series of webinars in English and French hosted in cooperation with Pax News and Pax Nouvelles, respectively.

Earlier in the year, the ETC Canada Chapter participated in Travelweek’s Future of Travel virtual conference. The Chapter also participated in the Association of Canadian Travel Agencies virtual summit in September with a virtual booth. Both actions further helped train travel agents and tour operators on new European safety travel protocols and travel experiences.

CO-OP CAMPAIGN WITH AIR CANADA AND ACV

ETC partnered with Air Canada and Air Canada Vacations (ACV) to invite Canadians to rediscover Europe. The two-month digital campaign kicked off in July as several European destinations started welcoming back Canadian travellers. The campaign raised awareness among consumers about Europe being open to travel, ensuring that European destinations were still top of mind for leisure travel throughout the summer period and beyond. The campaign landing page received 110,000 visits and generated more than 71,000 flight searches and over 2,000 attributed bookings.

BRAZIL WORKSHOP 2021

The ETC Brazil Chapter hosted a virtual workshop from 28 September to 1 October. The four-day event brought together over 250 Brazilian operators and agents and 60 European destinations. The event featured destination presentations, one-on-one meetings and many networking opportunities. The workshop was preceded by a press conference and virtual meetings between European destinations and local media.



EUROPE COMMUNICATION AWARD



The members of the ETC Brazil Chapter at the award ceremony

The [Prêmio Europa de Comunicação](#) is an initiative of ETC in Brazil which encourages and recognises the work of travel journalists, communication experts, and content creators contributing to the development and consolidation of the tourism image of Europe in Brazil.

In 2021, the 31st edition of the award paid tribute to the communication professionals who stood out in supporting and disseminating information about European destinations during the COVID-19 pandemic. The award ceremony took place on 2 December at the General Consulate of Portugal in Sao Paulo. It was the first onsite networking event following the restrictions imposed by the pandemic.



The event gathered more than 100 media and travel trade professionals. Eight journalists and travel bloggers were awarded a trip to Europe.

TRADE WEBINAR SERIES IN AUSTRALIA

The Australia Chapter hosted a trade webinar series with a focus on Europe's great outdoors. Over the course of three weeks, the 'Naturally Curious' webinar series introduced seven ETC members and their endless nature experiences and adventures on offer. The series gathered 435 registrations, with a live audience of 213 agents. The webinar recordings remain available for [on-demand viewing](#).



ETC BRINGS EUROPEAN CHRISTMAS TRADITIONS TO JAPAN

To celebrate its relaunch, the Japan Chapter organised its first joint event, highlighting Christmas traditions, gastronomy and customs of nine different destinations, showcasing Europe's cultural diversity. By focusing on a Christmas topic, the Chapter intended to convey a message of peace and hope for a future reunion. The event was hosted virtually on 11 and 12 December and managed to gather over 1400 registrations.

The event was organised in partnership with the Japan Association of Travel Agents (JATA) and with the support of Miki Tourist. The event is available for replay through the following [link](#).

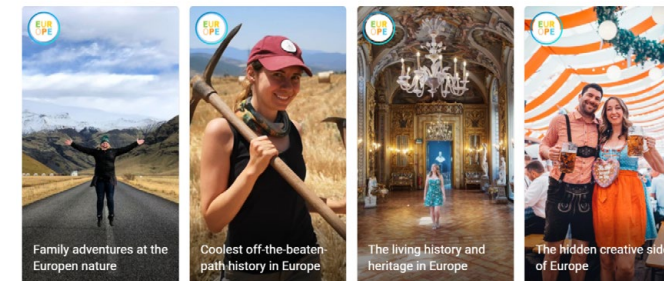


ETC members in Japan took consumers on a virtual Christmas tour of Europe

DIGITAL MARKETING

EUROPEAN STORIES NETWORK

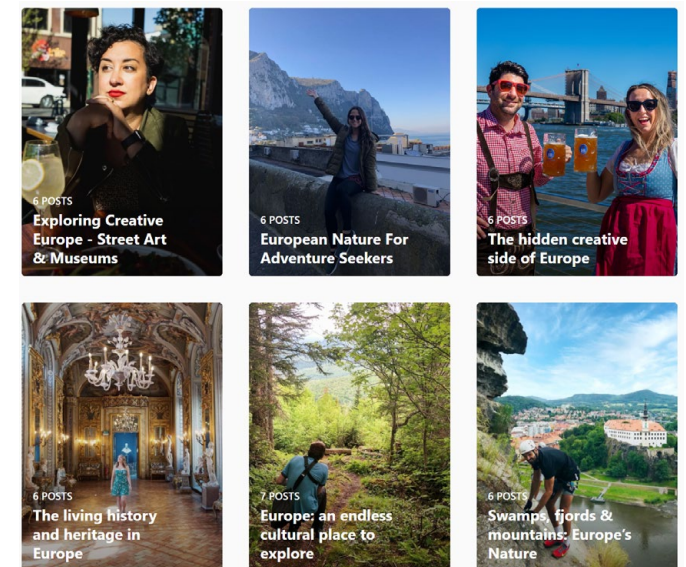
The European Stories Network significantly extended its size and reach over the year. The network allows the creation and global distribution of travel stories for Accelerated Mobile Pages (AMP), a mobile-focused format for delivering content in a visually rich and user friendly experience. Multiple working sessions with ETC member NTOs were held to explain how to use the platform. 12 NTOs joined the network and published 72 stories, adding to 135 stories available in the network. These stories were distributed to target audiences via galleries embedded on VisitEurope.com and other partner websites. The story galleries reached over 110,000 impressions and almost 8,000 story views.



INFLUENCER MARKETING

ETC set up and managed a program for global micro-influencers to virtually travel to Europe and connect them with like-minded Europeans. The program delivered 17 pan-European virtual trips in cooperation with ETC members, which joined the micro-influencers with local destination "Ambassadors", and other content creators from the same passion communities. The virtual tours of Europe took place between July and September 2021. Each micro-influencer shared various content (images, videos, stories, and Livestream interviews) on their social media channels about their experiences in 34 countries.

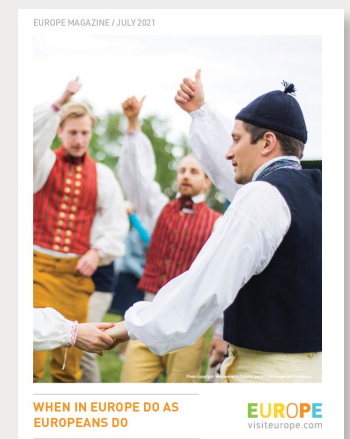
ETC repurposed the content developed by the micro-influencers for publication on the landing pages of the "Europe invites the curious" campaign on VisitEurope.com and global social media channels. A total of 114 posts and 243 stories were published on Instagram and Weibo, and 32 editorial articles and 17 AMP stories were published on VisitEurope.com. The content reached almost 7,6 million impressions and 60,000 engagements globally.



VISIT EUROPE E-ZINE

The Europe online magazine brought monthly travel inspiration to more than 110,000 leads worldwide. Throughout the year, 28 countries were featured in the e-zine, with an average of 20 destinations appearing in each issue. The editorial line was based on the Experience Europe brand strategy, covering a broad range of pan-European themes such as Nature and Outdoors, Creative Cities, History and Ancestry, and Gastronomy.

The magazine accumulated more than 250,000 pageviews. All issues of the Europe e-zine were published on the [VisitEurope.com portal](#). A monthly selection of articles was also repurposed and reshared on VisitEurope.com's social media channels to drive additional traffic to the e-zine.



PARTNERSHIPS

COOPERATION WITH THE CULTURAL HERITAGE SECTOR

The 'Destination of Sustainable Cultural Tourism' Awards enhance the visibility of European cultural tourism destinations, create a platform for sharing experience and knowledge, and promote networking between destinations. The 2021 edition focused on the theme of 'Regenerating European Tourism through Culture, Heritage and Creativity' and was supported by the Via Francigena Cultural Route of the Council of Europe, the European Association of Archaeologists (EAA), the Creative Tourism Network, FEDECRAIL – European Federation of Museum and Tourist Railways and E-FAITH – European Federation of Associations of Industrial and Technical Heritage. The Awards were open to tourist destinations across Europe, to showcase their results and contributions to sustainable cultural tourism under seven categories.

The awards received 36 applications from 14 European countries, with the winners and runners-up being selected by the Jury (composed of representatives of ECTN, ETC, Europa Nostra, NECSTouR, and the Directorate General for Education and Culture, European Commission). Angela Gerekou, President of the Greek National Tourism Organisation and ETC member, along with Eduardo Santander, Executive Director of ETC, were among the jury members of this edition who brought their extensive expertise on sustainable tourism to the evaluation of the applications.

The awarded contestants were announced at the 14th 'International Conference for Cultural Tourism in Europe', held in Athens, Greece on 21 October. At the conference, ETC Funding, Procurement and Development Manager Iulia Niculică also had the opportunity to present some of ETC's recent activities to the cultural sector, including the research on monitoring sentiment for domestic and intra-European travel.

Three of the winning projects were submitted by ETC members – the German National Tourist Board (GNTB) and the Romanian Ministry of Economy, Entrepreneurship and Tourism:



GNTB launched a digital image campaign on social media called Feel Good to promote Germany as a destination with reliable and diverse sustainable tourism products. The campaign has direct synergies to cultural tourism due to

topics like local traditions and regional products. Customers were inspired to use public transport and diverse possibilities for slow travel like hiking and cycling.

The marketing campaign #WanderlustGermany by GNTB addressed nature and active travellers with a focus on cycling and hiking around major cultural highlights. Recent studies revealed that customers considered COVID-19 risks to be particularly low in nature-oriented holidays and individual forms of holidays. Accordingly, the campaign focused on a diverse range of products with practical hygiene and safety concepts and first-class services.

The Romanian Ministry of Economy, Entrepreneurship and Tourism created a voluntary system for the recognition of National Cultural Tourist Routes, developed by tourism organisations or local public authorities. The Cultural Tourist Route of the Wooden Churches in Romania and in the Republic of Moldova is a transnational network connecting villages, cities, counties, and districts in which local communities have built their churches over centuries. It is an extraordinary journey into history and local legends.



The full list of winners can be viewed on the [ETC corporate website](#).



ECTN, the European Commission, Europa Nostra and ETC at the Awards Ceremony in Athens, Greece



Angela Gerekou, President of GNTO speaking at the opening of the ECTN Conference in Athens, Greece



ADVOCACY

BEST EUROPEAN RAIL TOURISM CAMPAIGN 2021 AWARDS

To celebrate '2021 European Year of Rail' (EYR), ETC and Eurail launched a joint award competition for the Best European Rail Tourism Campaign 2021.

The awards recognise the marketing campaigns that best promoted rail travel as a sustainable tourism model throughout Europe. This new initiative was designed to put rail firmly in the spotlight throughout the EYR 2021, to encourage the use of rail by citizens, travellers, and businesses, and to contribute to the EU Green Deal goal of becoming climate-neutral by 2050.

ETC and Eurail received entries from national and local tourism authorities, rail organisations, marketing agencies, and other entities with significant operations in the European tourism sector. The winners and runners-up were selected by an expert jury comprised of professionals from the tourism, rail, and marketing sectors.

The awards ceremony was unfortunately delayed due to COVID-19 restrictions and therefore took place in February 2022 during the ETC's Annual Meeting in Engelberg, Switzerland. ETC and Eurail honoured the winners, and announced that the awards would run again in 2022.



Best New Promotional Initiative 2021: Ostfriesland Tourismus GmbH and the Provincie of Groningen were awarded Best New Promotional Initiative EYR 2021 for their **WunderlineGO** app. The innovative app was designed to raise awareness of an improved train connection between the Northern Netherlands and Northern Germany. The WunderlineGO app combines mobility, public transport, and sustainability to facilitate travellers exploring and having fun throughout the Netherlands and Germany.



Best Completed Rail Tourism Promotion: Railways of the Slovak Republic, **Železnica spoločnosť Slovensko a.s. (ZSSK)**, were awarded Best Completed Rail Tourism Promotion for a viral campaign entitled **We Go by Train (Ideme Vlakom)**. At the centre of the campaign was a catchy song that used humour to reflect the benefits and realities of rail travel in Slovakia. The campaign was designed to showcase the rebrand of ZSSK, building awareness of the efforts to improve train travel throughout the country.



Most Promising Campaigns: KILROY, a Nordic travel agency that specialises in tailor-making individual travel experiences for young travellers won the award for its **Impact Challenge** campaign. The Impact Challenge is a slow travel race for the adventurous, curious, and everyday traveller. The challenge sees 12 teams travel via rail through unexplored Europe while racking up points in pursuit of winning the grand prize at the finish line.

Europe's Famous Hostels, an association of independent hostels across Europe and Israel, took home the second award for its **Eco Wanderer** campaign. The innovative campaign to be launched in 2022 promotes a loyalty program and reward system based on a CO2 emissions saving calculator which converts savings from rail users into points redeemable at hostels across Europe.



ETC, Eurail, the jury members, and the winners at the awards ceremony in Engelberg, Switzerland



SUPPORTING RESTART OF TRAVEL AND TOURISM IN EUROPE

As the COVID-19 pandemic still had a major impact on European travel and tourism throughout 2021, ETC worked with key stakeholders to call on European countries to better coordinate the pandemic response measures in the EU and establish a harmonised European approach to travel restrictions and safety measures.

ETC was actively involved in the debate on the EU Digital COVID Certificate (EUDCC) and the reopening of Europe. Together with a group of several major aviation and travel stakeholders, ETC released several statements between April and June, welcoming the initiative and calling for its speedy approval. The organisations emphasised that common, interoperable, and secure certificates would be an essential tool to facilitate the free movement of people within the EU and reopen travel in a safe and responsible way. Moreover, swift action and alignment among the European institutions was critical in making the EUDCC operational by summer.

SAVING EUROPE'S SUMMER



Ahead of Europe's reopening for travel in the summer months, ETC partnered with POLITICO Europe, one of the top EU media outlets covering European politics and affairs, for a virtual debate entitled "Saving Europe's summer: mission impossible?" which took place on May 26th. The event convened top EU and national policymakers, the travel industry, and health care experts to have a frank discussion on how to save Europe's summer. A newsworthy and very timely discussion was held just a few days after the EU institutions clinched a deal on the EU Digital COVID Certificate.

ETC President Luís Araújo opened the discussion with welcoming remarks stressing that European travel and tourism resilience was at its limit, while the sector kept calling to adopt a risk-based approach to reopen safely and responsibly. The debate covered the most pressing issues for the restart of travel in Europe, including how the EU can ensure the harmonisation of travel measures,

whether the COVID certificate will work to ease travel, how will Europe reopen to the rest of the world, and more.

The event had a strong reach with over 550 debate registrations (of which 37% were policymakers) and 5.6K unique viewers through the POLITICO Live event website and social media live streams. The audience was highly involved with 164 active users on Sli.do and 38 directed questions to the panellists.



As the year progressed, ETC continued its close cooperation with EU travel stakeholders to further facilitate travel. In October, ETC and a group of major EU travel and tourism stakeholders issued a joint position paper calling on EU Institutions to lift unnecessary travel restrictions. Namely, the associations suggested to stop the use of the ECDC colour-coded map and lift travel restrictions for all EU Digital COVID Certificate holders, irrespective of their area of origin. The position paper also emphasised that international travel should be made possible with the same conditions as intra-EU. The stakeholders also called on EU Institutions to abandon the use of the EU "White List" and accept the WHO emergency vaccine list for travel.

Further in November, as the COVID-19 situation was deteriorating across Europe, ETC partnered with WTTC, and with the support of numerous key travel stakeholders, urged EU Member States to align their responses and avoid imposing any limits to freedom of movement. The organisations reiterated that the sector could not afford inconsistent and ever-changing national responses, and a joint EU approach was the only solution to saving the struggling tourism sector in Europe.

EUROPEAN TOURISM MANIFESTO INTENSIFIES ITS ADVOCACY EFFORTS AS THE SECTOR STRUGGLES TO SURVIVE THE COVID-19 CRISIS



2021 was another busy year for the European Tourism Manifesto, an alliance bringing together 70 European public and private organisations, covering the whole tourism value chain and beyond. Under ETC's coordination, the group continued its countless calls for the harmonisation of travel restrictions and safety measures (when in place), and welcomed the adoption and swift implementation of the EU Digital COVID Certificate Regulation proposed by the European Commission.

In February, the alliance unveiled a series of joint recommendations for EU Member States on how to relaunch travel and tourism in Europe in time for summer 2021. At the heart of the recommendations was the development of an EU roadmap for safely restoring travel once countries emerge from national lockdowns, to be implemented in close cooperation with industry and social partners. "Our goal is for Europe to return to its place as the leading tourist destination in the world – and as a safe one. As EU

vaccination programmes progress and protect the most vulnerable citizens, we must jointly prepare for the restart of travel" stated the supporting organisations.

To convince the European governments that with the appropriate support, travel and tourism could be one of the most effective engines to deliver sustainable development in 2021 and beyond, the alliance published an important paper "Call for Action: Accelerate Social and Economic Recovery by Investing in Sustainable Tourism Development". This paper presented a non-exhaustive list of reforms and investment ideas to drive digital and green transitions of travel & tourism and wider EU economies, thus assisting Member States in drafting their national recovery plans.

To support the call for action, in March the alliance launched the [#Tourism4Recovery](#) campaign with the goal of raising awareness of the devastating impact of the COVID-19 crisis on European tourism, and showcasing how investment in sustainable tourism can be a key driver for the EU's recovery. The campaign featured a dedicated website page with user-generated content as well as a series of social media videos presenting tourism as a force for sustainable development. The alliance's travel & tourism partners joined the conversation online and promoted key investments required for sustainable tourism recovery.



More information about the activities of the group can be found at the [European Tourism Manifesto website](#).

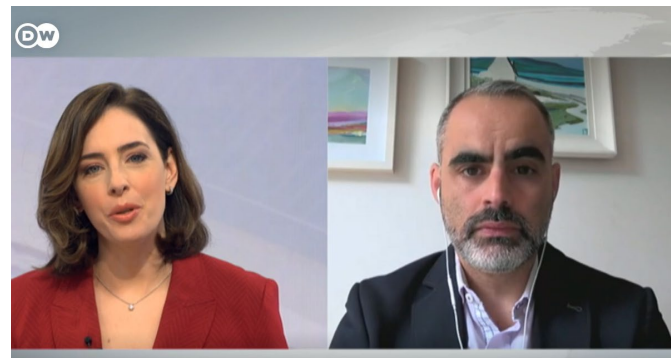
CORPORATE COMMUNICATIONS

A TRUSTED VOICE REPRESENTING EUROPEAN TOURISM DURING THE COVID-19 CRISIS

Throughout 2021, the COVID-19 pandemic and the future recovery were kept in the spotlight in ETC's media communications. Having built upon the successes of 2020, ETC has further established itself as a trusted and reliable voice representing the sector in Europe and advocating for its interests in face of the COVID-19 crisis.

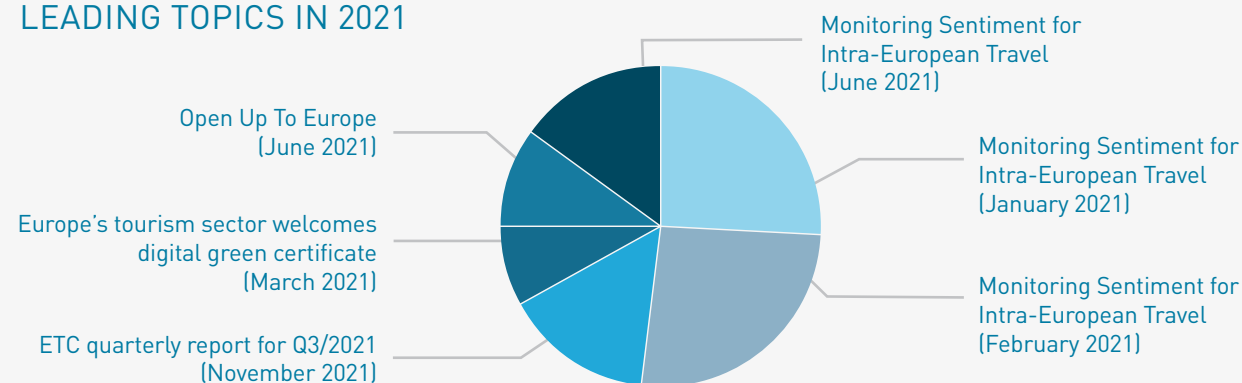
In 2021, ETC issued 25 press releases and published 19 articles online to promote the findings of the latest research publications and marketing activities, as well as to support its advocacy messages, continuously calling for further harmonisation of travel rules across Europe and for more support to the tourism sector. ETC's work in 2021 received extensive media coverage worldwide, generating

over 1200 press mentions in various mainstream and trade outlets.

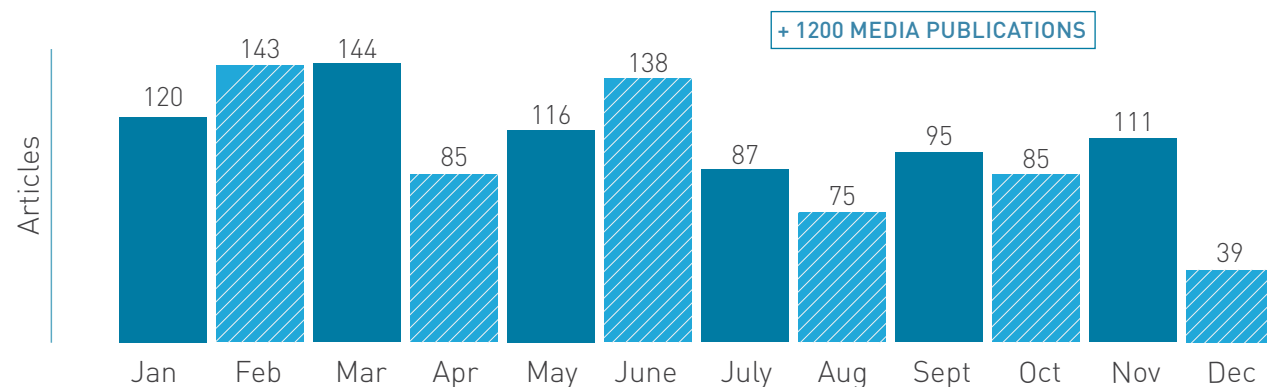


ETC Executive Director Eduardo Santander's interview with Deutsche Welle on Europe's summer reopening, May 2021

LEADING TOPICS IN 2021



ETC MEDIA COVERAGE IN 2021



The report "Monitoring Sentiment for Domestic and Intra-European Travel – Wave 5", published in February was the press release that gained the most coverage in 2021, with a total of 96 publications. The second most covered press release, with a total of 91 articles, was the report "Monitoring Sentiment for Domestic and Intra-European Travel – Wave 4" released in January. This highlights the interest and attention that these reports holding the latest insights on Europe's travel sentiment and preferences gain from news outlets. ETC's quarterly reports on "European Tourism: Trends & Prospects" also attracted high interest from the wider public, with the report for Q3/2021 published in November gaining over 50 press mentions.

ETC also continued to foster relationships with journalists across key mainstream media outlets. In 2021, ETC received 105 media requests. In parallel to 2020, media coverage throughout 2021 remained centred around COVID-19, travel restrictions, the reopening of borders, and tourism recovery. Comments and insights from ETC were featured in a number of top tier international media, including [Associated Press](#), BBC News, [Bloomberg](#), [CNBC](#), [CNN](#), [Euronews](#), [Financial Times](#), [Forbes](#), [New York Times](#), [NBC](#), [the Wall Street Journal](#), [Washington Post](#), and other major press outlets.

Thanks to ETC's reliability and insightful responses, numerous journalists from outlets such as BBC News, Washington Post, New York Times and Euronews among others returned to ETC, in some cases three or four times throughout the year for comments and research insights.

Similar to 2019 and 2020, the US is the country that published the highest share of articles based on ETC press releases. This can be attributed to the variety of coverage garnered around travel restrictions, travel corridors and the banning of travel between the US and EU.



ETC President Luís Araújo giving an interview to Jessica Yellin from #NewsNotNoise inviting American travellers to visit Europe, June 2021

The New York Times

EUROPE | E.U. Proposes New Travel Restrictions on Unvaccinated U.S. Visitors

Luís Araújo, the president of the European Travel Commission, said, "Further unjustified changes in regulations will undoubtedly negatively affect the tourism sector, which is slowly recovering from its worst crisis."



ETC President Luís Araújo's comments on new travel restrictions in The New York Times, August 2021

On the European side, Greek media organisations reacted to ETC press releases the most, followed by Spanish press. The coverage in Greek and Spanish outlets can be related to the impact of travel restrictions on the Greek and Spanish economies throughout 2020 and 2021, and the interest generated from ETC activities in relation to restarting travel and tourism.

Heading into 2022, ETC is well positioned to continue providing valuable insight to news outlets and be counted as the definitive organisation offering insight into the travel and tourism sector in Europe.

MEMBERSHIP

FRANCE AND AUSTRIA REJOIN ETC

As European tourism faces numerous challenges, unity and cooperation in times of crisis is key. In 2021, ETC was delighted to welcome back Atout France (approved in August 2021) and the Austrian National Tourist Office (approved in November 2021) to the ETC family. The organisations are joining other ETC members to collaborate on the renewal and revival of European tourism, with a shared ambition to further support the competitiveness of Europe as the world's leading tourist destination.

Atout France is delighted to join the European Travel Commission and to have the opportunity to exchange views and best practices with national organisations from all over Europe as the path to recovery needs further coordination and harmonisation. It is extremely valuable to be able to count on this solidarity and collective mobilisation to build an ambitious recovery plan for tourism in Europe

Caroline Leboucher, CEO of Atout France

In times of instability and due to the unpredictable nature of the future of tourism, I consider it essential to share knowledge and experience on a broader European level. This stands in no contradiction to the fact that each European destination will remain unique in its approach and performance, but we are stronger by working and developing together.

Lisa Weddig, CEO of the Austrian National Tourist Office

EUROPEAN NTOS LEADING BY EXAMPLE

To lead by example and showcase that safe travel is possible in times of the pandemic, ETC members gathered in person for the ETC General Meeting #101 in Algarve hosted by Turismo de Portugal, and for the ETC Board of Directors #101 in Dubrovnik hosted by the Croatian National Tourist Board. ETC members continued discussing the important topics of recovery, joint measures, the importance of clear communication and crisis management with a joint vision to strengthen the sustainable development of Europe as a tourist destination.



ETC family picture at the General Meeting in Algarve, Portugal



ETC Board of Directors in Dubrovnik, Croatia

FUNDING

ETC is constituted under Belgian law as an International Association Without Lucrative Purpose (AISBL/IVZW). Being a non-profit organisation, ETC is subject to tax on legal entities, which is not applied on global income but only on income derived from specific sources, i.e. real estate.

In 2021, ETC used a grant from the European Commission focused on the promotion of 'Destination Europe' in line with the priorities for recovering travel and tourism across the continent. Alongside the EU funding, other main sources of income are membership contributions and partners' buy-ins in marketing campaigns in the framework of the Joint Promotion Platform.

The figures provided are pending final approval at the moment of publication.

EXPENSES OVERVIEW

Marketing
€3,519,893

Research
€308,440

Advocacy
€108,668

INCOME OVERVIEW

European Commission
Grant
€2,767,028

Partners
€1,321,421

Membership fees
€1,124,555

WHO WAS WHO AT ETC IN 2021¹

PRESIDENT



Luís Araújo (Portugal)

VICE-PRESIDENTS



Magda Antoniolí (Italy)



Kristjan Staničić (Croatia)



Martin Nydegger (Switzerland)

BOARD OF DIRECTORS



Peter De Wilde (Belgium)



Caroline Leboucher (France)



Petra Hedorfer (Germany)



Miguel Sanz (Spain)



Könnnyid László (Hungary)



Václav Mika (Slovakia)



Inese Sirava (Latvia)



Bente Bratland Holm (Norway)

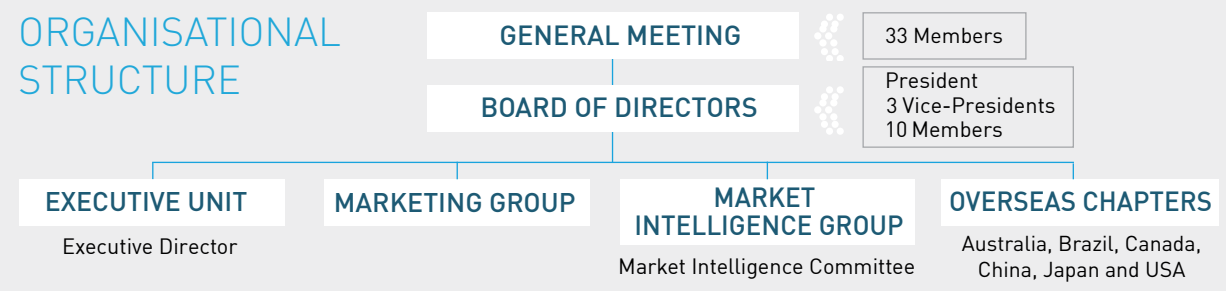


Guy Antognelli (Monaco)



Ana Tripkovic Markovic (Montenegro)

ORGANISATIONAL STRUCTURE



¹ Accurate as of end of 2021

FULL MEMBERS

<p>Belgium (Flanders)</p> <p>Visit Flanders</p>	<p>Belgium (Wallonia)</p> <p>Wallonie Belgique Tourisme (WTB)</p>	<p>Bulgaria</p> <p>Ministry of Tourism of the Republic of Bulgaria</p>	<p>Croatia</p> <p>Croatian National Tourist Board (CNTB)</p>	<p>Cyprus</p> <p>Republic of Cyprus, Deputy Ministry of Tourism</p>
<p>Czech Republic</p> <p>CzechTourism</p>	<p>Denmark</p> <p>VisitDenmark</p>	<p>Estonia</p> <p>Estonian Tourist Board - Estonian Business and Innovation Agency</p>	<p>Finland</p> <p>Visit Finland - Business Finland Ltd.</p>	<p>France</p> <p>Atout France</p>
<p>Germany</p> <p>German National Tourist Board (GNTB)</p>	<p>Greece</p> <p>Greek National Tourism Organisation (GNTO)</p>	<p>Hungary</p> <p>Hungarian Tourism Agency</p>	<p>Iceland</p> <p>Icelandic Tourist Board</p>	<p>Ireland</p> <p>Tourism Ireland Ltd.</p>
<p>Ireland</p> <p>Fáilte Ireland</p>	<p>Italy</p> <p>ENIT - Agenzia Nazionale del Turismo</p>	<p>Latvia</p> <p>Investment and Development Agency of Latvia (LIAA)</p>	<p>Lithuania</p> <p>Ministry of Economy and Innovation of the Republic of Lithuania</p>	<p>Luxembourg</p> <p>Luxembourg for Tourism (LFT)</p>
<p>Malta</p> <p>Malta Tourism Authority (MTA)</p>	<p>Monaco</p> <p>Monaco Government Tourist and Convention Office</p>	<p>Montenegro</p> <p>National Tourism Organisation of Montenegro</p>	<p>The Netherlands</p> <p>NBTC Holland Marketing</p>	<p>Norway</p> <p>Innovation Norway</p>
<p>Poland</p> <p>Polish Tourism Organisation (PTO)</p>	<p>Portugal</p> <p>Turismo de Portugal</p>	<p>Romania</p> <p>Romanian Ministry of Tourism</p>	<p>San Marino</p> <p>State Office for Tourism</p>	<p>Serbia</p> <p>National Tourism Organization of Serbia (NTOS)</p>
<p>Slovakia</p> <p>Slovakia Travel</p>	<p>Slovenia</p> <p>Slovenian Tourist Board</p>	<p>Spain</p> <p>Turespaña - Instituto de Turismo</p>	<p>Switzerland</p> <p>Switzerland Tourism</p>	

ASSOCIATE MEMBERS



