

# RESEARCH HIGHLIGHTS



## INDEX

N<sup>o</sup> 3 / January 2006

- 2006 - Year of Market Intelligence ..... P.1
- ETC Research Programme 2005-2006 ..... P.2
- **Research features**
- 25 Years of Inbound Tourism to the UK ..... P.3
- The Use of TSA in Designing Tourism Strategies ..... P.4
- **Members' Practice**
- Hungary : Development of the Statistical & Marketing Information System ..... P.5
- Slovenia : Communicating Research to the Trade ..... P.5
- **3 Questions to...**
- Alison Metcalfe, ETC Canada Operations Group ..... P.6
- **Partners' News** ..... P.6
- **ETC News** ..... P.7
- **Coming Soon** ..... P.8

## A WORD FROM THE CHAIRMAN



Welcome to the third edition of Research Highlights, the ETC Research Group's newsletter.

With 2006 having been declared the ETC's Year of Market Intelligence, the twelve months ahead of us stand to present new challenges and opportunities for the ETC's research function. Most importantly, the coming months will serve to strengthen the important role that market research has carved out for itself within the ETC.

Our main challenge during 2006 will be for the group to evolve from a market research function to a market intelligence function. This is particularly relevant in supporting the launch and continued development of ETC's [www.visiteurope.com](http://www.visiteurope.com) portal.

It means, too, that we will move from providing a service aimed principally at ETC members to one which also feeds directly into the decision-making process of ETC itself.

The year ahead will present a unique opportunity for us in the Research Group to consolidate this responsibility by proposing practical ways in which we will deliver the tasks required of us. This will be one of the main issues for discussion at all of our meetings in 2006. Of particular relevance will be the strategic market intelligence meeting which is scheduled to take place in Malta following the ETC's autumn General Meeting.

I am confident that, with our joint effort, we will be successful in delivering what is expected of us. In doing so, we will strengthen further the good name which the ETC Research Group has acquired for itself, both within the member countries and with the numerous external organisations with which it co-operates regularly. ■

**Leslie Vella**  
Chairman, ETC Research Group

## 2006 - ETC YEAR OF MARKET INTELLIGENCE

by Dr Arthur Oberascher  
President, European Travel Commission

The most sophisticated technical means, carefully crafted strategies and biggest budgets are all ineffective without profound knowledge of the marketplace. Information - intelligence - is the indispensable basis for effective marketing. And market intelligence is at the heart of the mission of national tourism organisations (NTOs): to act as intermediary and interpreter between demand and supply, between guest and product.

With the "Year of Market Intelligence", the European Travel Commission takes up the second of its three annual initiatives - e-marketing, market intelligence and operational excellence - that aim to focus attention on major issues for the success of Europe's tourism industry, NTOs and ETC.

The Declaration on the Future of European Tourism adopted by ETC at its General Meeting last October pinpointed market intelligence among the research and development challenges that European tourism faces. And market intelligence has implications for the other spheres - human resources and sustainable development - that the declaration identifies as crucial to the competitiveness of Europe's tourism sector.

Today, the importance of market intelligence comes into particularly sharp focus as Europe's tourism industry sets its sights on new source markets in parts of the world such as India, China, Brazil and Russia. The emergence of these markets represents a test not only for

European tourism's market research competence, but also for its cultural intelligence. To remain relevant to the needs of the tourism industry and NTOs, researchers must increasingly produce qualitative as well as quantitative intelligence.

At a strategic level, highlighting market intelligence will remove from tourism the image of a low-skill, low-grade business and position it as a modern, innovative, knowledge-based industry, one that can help spearhead the European Union's Lisbon strategy to make Europe the world's most dynamic and competitive economy.

The European Travel Commission has long been widely respected for the market intelligence produced by the Research Group under its experienced chairman, Leslie Vella. Research partnerships with bodies such as the World Tourism Organisation and European Cities Tourism are testament to the quality of ETC's work in the field. ETC hopes, of course, that the "Year of Market Intelligence" will bring more of the same. But the year is also an occasion to reinforce the relevance of our market intelligence activities both to ETC's own strategy and to the strategies of our member organisations. Moreover, this initiative must heighten awareness of the need to combine the market intelligence resources of Europe's NTOs and of the ideal platform that ETC represents for achieving more together than we could individually. ■



# RESEARCH HIGHLIGHTS



N°3 / January 2006

## ETC RESEARCH PROGRAMME IN 2005-06

A total budget of €117,000 was available for ETC research activities in 2005 (€ 92,000 from ETC's central budget and € 25,000 from WTO).

This year's programme has focused on 2 major exercises, commissioned jointly with partners WTO:

- **Survey on the Position & Image of Europe in the Chinese Travel Market** and a
- **Handbook on Market Segmentation Methodologies.**

We report on both of these elsewhere in this edition of Research Highlights.

Work also started or continued this year on a number of smaller projects, including:

- **Market Updates:** A new series of annual market updates on the main long-haul markets for Europe. (For ETC members only.)
- **European Tourism Insights 2005 & Outlook 2006:** The second annual edition of this report monitoring trends and developments in Europe's travel and tourism industry during 2005. (For publication in January 2006.)
- **NTO Budget Benchmarking Survey 2005:** This survey has become an annual exercise for NTOs. The 2005 edition will be published in early 2006.
- **TourMIS:** Continued support for the development of the 'TourMIS' platform for the exchange of European tourism statistics online: [www.tourmis.info](http://www.tourmis.info)

Reports can be found on the ETC corporate website [www.etc-corporate.org](http://www.etc-corporate.org)

(Research – sub menu Research Reports).

- **Communication tools:** The production of two issues of Research Highlights; the setting up on an E-Library for ETC members (see article); participation in a seminar on city tourism & culture at the World Travel Market; and press releases etc, to share market intelligence and research amongst ETC members.

### Also published in 2005

- **Study on City Tourism & Culture: The European Experience**
- **European Tourism Insights 2004 & Outlook 2005**
- **Benchmarking Study on NTO Budgets 2004**

### Due soon....

- **Handbook on Tourism Forecasting:** A joint ETC/WTO project analysing best practice in forecasting and providing practical guidelines for NTOs will be published in early 2006.

### Preview of Research in 2006

In addition to continuing support for ongoing research tools such as 'TourMIS', the E-Library and Research Highlights, this year's agenda will include the following items:

- **Study on Russian Outbound Tourism**
- **Market Updates:** Continuing the series commissioned in 2005 (see article) - and including an **India update.**
- **Best-Practice Guide on E-marketing:** an important priority following the launch of the European tourism portal, [www.visiteurope.com](http://www.visiteurope.com)
- **Seminar on City Tourism & Culture:** This long-awaited event will be held jointly with partner organisations WTO and ECT in June in Helsinki, Finland. ■

## ETC-TOURMIS WORKSHOP 2005

by Bettina Kuprian, Research & Development, Austrian National Tourist Office



A workshop was held on 14th and 15th September in Vienna to improve ETC members' knowledge and use of TourMIS. ■

Recognising the substantial progress made by the initiative since 2001, the workshop agreed that:

- the site should be used in preparations for the Pisa meeting and the **Research Directors' Annual Meeting** in February;
- there should be regular workshops and training courses; and
- that members' websites should link directly to TourMIS. ■

### ETC'S NEW E-LIBRARY

Following the adoption of a new communication strategy for the Research Group, we started work in early 2005 on setting up an E-library which will facilitate the sharing of NTOs' market intelligence online and make it more freely available to other ETC colleagues.

There are currently some 185 titles listed - either with links to online copies and/or an English summary. The listing also provides details of contact persons in the relevant NTO who can give you more information on the subject you are interested in.

Updated monthly, the E-Library is divided into the following sub-sections: Best Practice, European Markets, Overseas Markets, Segments & Products and Miscellaneous.

#### Help us to help you !

This is an ongoing project, and as everyone realises, Rome wasn't built in a day ! So, if you have not yet sent us details of your NTO's publications - or, if you have any suggestions or ideas, please send them to Kevin Boiteux at the ETC Executive Unit - [kevin.boiteux@etc-corporate.org](mailto:kevin.boiteux@etc-corporate.org) - and we'll add them to the list.

To see the E-library, please go to our intranet (only available to ETC members) [www.etc-intranet.org](http://www.etc-intranet.org) and enter using your login & password. Then choose the E-Library menu.

### TourMIS: European Tourism Statistics on-line

TourMIS provides on-line tourism survey data, as well as various tools to transform data into valuable management information.

Since 2000 this initiative has provided the tourism industry with predominantly **free** access to the overall data and functions of TourMIS (registration is required).

 [www.tourmis.info](http://www.tourmis.info)

# RESEARCH HIGHLIGHTS



N°3 / January 2006

## RESEARCH FEATURES

### 25 YEARS OF INBOUND TOURISM TO THE UK

by Alex Flack, Head of International Research, VisitBritain

VisitBritain has produced a special edition of its monthly tourism commentary, "Foresight", which explores trends, key events and the changing nature of inbound tourism over the past twenty-five years.

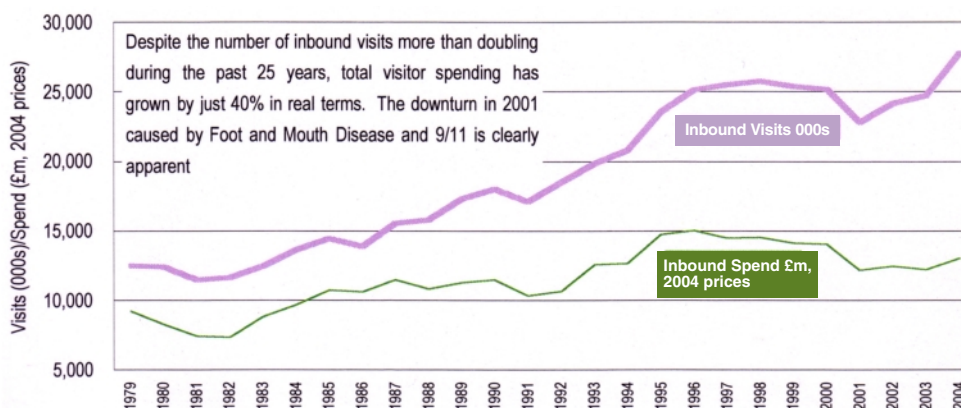


these markets, not least as a result of marketing campaigns aimed at business "leisure extenders" or at encouraging VFR visitors to do and spend more during their stay.

Tourism to the UK has grown since 1979, but this growth has been influenced by several important trends:

- **The world's population is ageing steadily:** and so is tourism by those aged over 55.
- **Seasonality:** inbound tourism remains highly seasonal, but is spread far more evenly than it was in 1979.

#### Trends in visits and spend



- **The global trend towards "short breaks":** Consistent reductions in the average length of stay in the UK have led inevitably to a lower spend per visit.
- **New lower-spending markets:** visitors from the new EU member states have increased in number, but do not spend as much as traditional high-spending visitors from the likes of USA and Japan.
- **Business and VFR:** the biggest growth over the past 25 years has come from
- **Regional spread:** London still accounts for the lion's share of visitor spending, but all other UK regions have increased their respective shares.
- **Phenomenal growth in arrivals by air:** they have increased by 163% since 1979, largely because of the rapid development of low-cost airlines.
- **Advances in telecommunications and the internet:** these have revolutionised the way people plan and book travel and also the way in which destinations brand and market themselves. A destination brand now lives or dies by the quality of its internet presence.

The full article can be found at : [www.tourismtrade.org.uk](http://www.tourismtrade.org.uk) under menu Market Intelligence & Research, and then Foresight. Further information can also be obtained from David Edwards: ([david.edwards@visitbritain.org](mailto:david.edwards@visitbritain.org)) or Alex Flack: ([alex.flack@visitbritain.org](mailto:alex.flack@visitbritain.org))

The future will be challenging. Will the scarcity of oil, and congested skies and airports make airfares more expensive (not ever cheaper)? Can tourism businesses meet the needs of visitors from new markets? The marketing strategies of the future will have to deal with all this and more.

### World Travel Monitor Forum 2005



This year's Pisa Forum, organised by IPK International, was held from 1st to 5th November in St. Giuliano Terme near Pisa, Italy.

The forum was attended by some 59 international research experts representing both the supply and demand sides of the industry. The participation of 15 European NTOs ensured that ETC was well represented too.

ETC presented the first results for long-haul tourism into Europe in 2005 and its assessment of the outlook for 2006. There were presentations from Leslie Vella and Tom Ylkänen which drew on a survey carried out using the TourMIS platform and on a qualitative questionnaire to NTOs. Both presentations can be downloaded from our intranet, as can a presentation on low-cost airlines by Hungary.

Another outcome of the forum was a 'UK & European Travel Report' launched at the World Travel Market in London in November. The report is also available online on :

<http://www.etc-corporate.org> (Research – sub menu Research Reports).

# RESEARCH HIGHLIGHTS



N° 3 / January 2006

## RESEARCH FEATURES

### THE USE OF TOURISM SATELLITE ACCOUNTS IN DESIGNING TOURISM STRATEGIES

by Dennis Bederoff, Acting Managing Director, Swedish Tourist Authority, & Tom Ylkänen, Research Manager, Finnish Tourist Board



In October 2005, in Iguazu in South America, the World Tourism Organisation (WTO) held a conference on tourism satellite accounts. The subject of the conference was "The Tourism Satellite Account (TSA): Understanding Tourism and Designing Strategies". Over 430 delegates and 70 speakers from more than 80 countries attended the conference, including Dennis Bederoff and Tom Ylkänen.

#### Managing Tourism Satellite Accounting -

by Dennis Bederoff

The ability to correctly measure and present tourism, to boost its credibility as a factor of economic development alongside other economic sectors, is one of the main objectives of national tourism organisations (NTOs) all over the world. TSAs are instrumental in this.

By October 2005, 67 countries were running TSAs, experimenting with them, or expecting to implement them during 2005/6.

There is no single way of organising TSAs. Each country must take a path reflecting its own national circumstances and needs. However, the WTO is urging all national tourism administrations to establish an inter-

institutional framework which guarantees the continuity of TSA statistics: a coming together of each country's Central Statistical Office (CSO), central bank, other relevant government bodies and industry representatives. The CSO is usually the body in charge of the system of national accounts to which the TSA is a satellite.

More work is needed to build on the success of the TSA project so far. One idea at the conference was a technical assistance programme supporting, for example, training for the staff involved in TSAs and increased co-operation with academic and economic research bodies.

#### Using TSAs to design tourism strategies -

by Tom Ylkänen

Use of the TSA is not restricted to highlighting the economic importance of tourism in overall national accounts. It can also be developed into a model with which we can simulate/calculate different tourism development scenarios.

In an ideal world, marketing planning should be a question of how to maximise the benefits of tourism in monetary terms. In most countries, however, this is not the case. Goals are set in volumes - such as visitor numbers or arrivals, or bednights - rather than tourism receipts. Tourism is surely one of the few branches of the economy where volume is seen as more important than economic indicators.

Yet accurate spending figures for the different market segments would make it easy to calculate the impact of these segments elsewhere in the economy: on jobs, for example, or on business turnover. By basing their plans on these figures, marketers and strategists could concentrate on those market segments which bring the most benefit to the economy.

Note that this does not necessarily mean the highest-spending segments. Catering for the big spenders may require heavy investment in tourist and other infrastructure (five-star hotels, golf courses, etc.), the importing of goods, services and personnel from abroad - which could be

disastrous for the economy.

The bigger picture offered by the TSA would allow us to see the economic advantages and disadvantages of the different segments. Indeed, analyses based on TSAs could actually change the whole picture of tourism in a country. A previously low-rated segment could prove to be a very profitable segment when seen in the wider macroeconomic context of a TSA..

You could even go a step further and combine such TSA analyses with an evaluation of countries' marketing activities abroad. This would show:

- the segments which give the best return on investment (ROI) from an NTO's marketing perspective
- the segments which give the best results for the whole economy in terms of turnover, value added and employment.

By combining these data, a country would be in a position to maximise both:

- the return on investment of its marketing budget, and
- tourism's impact on the economy.

Of course, where conflicting results emerge from this process, compromises would have to be made.

The methodology could be applied at regional level too. Work on developing regional TSAs is already underway in several countries, including Finland, increasing further the scope for using the TSA in marketing planning.

So far, any discussion about the TSA's role in marketing is inevitably a theoretical discussion. Much work remains to be done before the TSA can be used in the ways described above. But theory could be about to give way to practice. Canada, already a leader in the development of TSAs, has now started to look at their possible marketing applications. Perhaps what is really needed is an international co-operation project under the guidance of the WTO. ■

For further information on the world conference visit: [www.world-tourism.org](http://www.world-tourism.org) (menu statistics & economics)

#### UNWTO RESEARCH NEWS



The UNWTO Secretariat has already published the first Edition of the UNWTO World Tourism Barometer for the year 2006. The publication contains first preliminary estimates for international tourism in 2005, plus a first forecast for the full year 2006. Figures for 2005 are presented for the world, regions and sub-regions, and cover more than 120 countries. Forecasts for the current year refer to the world, as well as to the five regions. A sample of the Barometer can be found under:

<http://www.world-tourism.org/facts/eng/barometer.htm>

# RESEARCH HIGHLIGHTS



N°3 / January 2006

## MEMBERS' PRACTICE

### HUNGARY: DEVELOPMENT OF THE STATISTICAL & MARKETING INFORMATION SYSTEM

by Kornelia Kiss, Research Director, Hungarian National Tourist Office



HUNGARY  
Talent for entertaining.

It is becoming ever more important to have up-to-date, comprehensive and reliable data when drawing up strategic and operational tourism plans or making marketing decisions. With this in mind, several countries - including Hungary - have devoted considerable effort to developing their tourism statistics systems. In the case of Hungary, we also tailored our system to the needs and requirements of the European Union's 1995 tourism statistics directive.

After a long time measuring tourism by means of supply-side statistics (such as the amount of accommodation stock and the number of tour operators and travel agencies), the Hungarian Central Statistical Office has started measuring the demand side as well. Since June 2003, their surveys have analysed incoming, domestic and outbound tourism on a quarterly basis. The resulting information allows us to analyse demand for tourism in Hungary by segment: day visitors, tourists, source markets, motivations (leisure and business tourism), travelling habits (transport, accommodation,

#### Main features of the methodology

	Incoming tourism	Domestic tourism
<b>Population</b>	Foreigners visiting Hungary	Hungarian households
<b>Sample size</b>	10,000 interviews per month	13,000 interviews per quarter
<b>Sample selection criteria</b>	<ul style="list-style-type: none"> <li>■ Type of border (land, airport)</li> <li>■ Location of border point (based on previous proportion of border arrivals / departures)</li> </ul>	<ul style="list-style-type: none"> <li>■ Size &amp; structure of household</li> <li>■ Size of settlement</li> </ul>
<b>Methodology used</b>	<ul style="list-style-type: none"> <li>■ Border survey (foreigners leaving Hungary)                             <ul style="list-style-type: none"> <li>➢ Personal interview</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Household survey                             <ul style="list-style-type: none"> <li>➢ Personal interview</li> </ul> </li> </ul>

organisation) and expenditure (volume and structure).

The Hungarian Central Statistical Office and the Hungarian National Tourist Office co-operated closely in the development of the statistical system. This ensured that the system also generated the data needed for marketing purposes.

HNTO's role in this work included contributing to the development of the questionnaire; involvement in teaching the interviewers; providing brochures and

giveaways for the interviewees; and helping to publicise the development process and its results (for example, through presentations, press releases and information targeted at tourism professionals and service providers). ■

Further information is available from Ms Kornelia Kiss:  
[kissk@hungarytourism.hu](mailto:kissk@hungarytourism.hu)  
[www.hungary.com](http://www.hungary.com)

### SLOVENIA : COMMUNICATING RESEARCH TO THE TOURISM INDUSTRY: The experience of the Slovenian Tourist Board

by Tinkara Pavlovčič Kapitanovic, Director of Research and Development, STB



The benefits of tourism market research are well known: better understanding of tourism market dynamics, customer segments and the effectiveness of marketing activities and, therefore, more-targeted marketing planning and decisions. However, research is expensive and in tourism, it is often mainly the national tourism organisations (NTOs) that have the resources to undertake it.

NTOs must ensure that the results of their research are disseminated to the trade and local tourism interests in their countries.

In Slovenia, the Slovenian Tourist Board (STB) has identified several issues that prevent the tourism industry from making greater use of its research:

- a lack of awareness in the industry about the importance and practical benefits of the research;
- STB's existing research communication channels are too little known and used;

- the sheer number of external online sources is confusing for the industry. Additionally, many partners are unaware of the research information provided by STB's trade portal, research agencies or other organisations such as WTO, and ETC;
- lack of knowledge about the range of STB research services which are available free of charge to the industry.

STB has held meetings with industry representatives to see how communication with them can be improved and to find out what research activities they expect STB to carry out. These have led to the following initiatives (amongst others):

- STB's trade portal and magazine, newsletter and public events (such as the annual research seminar) all publicise available online and offline research sources and reports;
- research updates are e-mailed to the industry regularly;

- STB's research publications are also available in hard copy;
- the industry is encouraged to submit research enquiries by e-mail ([research@slovenia.info](mailto:research@slovenia.info)) or by phone;
- research findings are disseminated in STB presentations to local partners; and
- STB has set up a users' group to involve industry representatives in some of its new research projects.

In addition, plans for 2006 include piloting and promoting the STB research library to third parties, and getting the users' group more involved in the STB research process. ■

For more information, please contact:  
[Tinkara.pavlovic@slovenia.info](mailto:Tinkara.pavlovic@slovenia.info)

# RESEARCH HIGHLIGHTS



N°3 / January 2006

## PARTNERS' NEWS

### CITY TOURISM BENCHMARKED

by Hans Dominicus,  
Director of Marketing & Development  
ATCB - Amsterdam Tourism  
& Convention Board

City tourism is big business.

In 2004, European cities registered 170 million international arrivals - about 20% of all international tourism to and within Europe. (IPK figures.)

In 2002, spending by international visitors reached roughly €237 billion - half the size of Europe's entire automotive sector. (A figure calculated by European Cities Tourism [ECT] and the University of Vienna.) Average daily spending by visitors to cities is higher than that on most other types of holidays.

ECT's Research and Statistics Working Group will be looking again at the economic impact of international tourism to cities shortly, but in the meantime, ECT has just launched the second edition of its official annual report on city tourism. This report takes the complex statistics collected by TourMIS and turns them into simple and comprehensive graphs and charts - a valuable and accessible source of information for destination managers across Europe.



This 2005/6 edition of the report analyses trends in the number of bednights spent in cities from 1998 to 2004, assessing gains and losses in market share. It also looks at the development of eight key national source markets for European city tourism over that period. This information allows tourism managers to identify their closest competitors and their most important growth markets, and thus to make informed adjustments to their marketing and tourism product strategies.

ETC has had a partnership arrangement with ECT since 2003. Sharing knowledge is an important part of this arrangement and so we are delighted to offer ETC members the chance to buy this new report at the reduced price of €840 plus postage and packing. (The full price is €940 plus p&p.) Order forms are available on ETC's intranet.

## 3 QUESTIONS TO...

### ALISON METCALFE

Chair, ETC Canada Operations Group

► **How important is market research to the Canadian Operations Group in developing your market strategy and operating plan?**

Market research is vital to the successful development of our marketing strategy and the execution of a well targeted operating plan. It helps us to develop dynamic consumer campaigns for member countries as we endeavour to stay ahead of the pack in maintaining and increasing market share for Europe from Canada.

Working closely with the Canadian Tourism Research Institute, we have access to the latest research on Canadian consumers and the general outbound travel market.

This research gives us invaluable insight into changing consumer needs, expectations and booking patterns. It also enables us to keep abreast of the many changes in tourism technologies and distribution channels and allows us to respond to the ever changing and highly competitive market environment in which we operate.

► **What impact will the launch of the new ETC portal have on the Canadian Operations Group marketing campaign in 2006?**

We are excited about the impending launch of the new ETC portal. Canadian consumers have one of the highest internet usage rates in the world and they are avid users of the internet when it comes to researching, planning and booking travel arrangements.

A world-class consumer website is

essential if ETC, as the umbrella marketing group for Europe, is to maintain its leadership role in showcasing Europe's core destination attributes and product offerings to Canadian consumers.

As a result, we have developed an integrated multi-media marketing campaign which will include both on- and off-line activity designed to drive consumer traffic to the new ETC portal.

We have increased our emphasis on e-marketing activity supported by member countries and commercial partners, and we hope to be able to employ web analytic tools to help us better understand the Canadian consumer for future database marketing activity.

► **Have your research needs changed as a result of the internet economy?**

The new economy requires us to think differently - to anticipate, react to, and exploit business opportunities at lightning speed. We cannot afford to leave marketing success to chance. We need to become better equipped to predict and fulfill customer needs while accurately measuring the ROI of ETC's marketing investment and quantifying the effect that our marketing efforts have on stimulating incremental visitor traffic to Europe.

We hope that the new portal will allow ETC to survey web visitors and obtain valuable consumer data that can be fed back into the marketing planning process - and used in adapting the messages and products we offer to the needs and wants of our best prospects for Europe.



# RESEARCH HIGHLIGHTS



N°3 / January 2006

## ETC NEWS

### ETC MEMBERS ADOPT 'VIENNA DECLARATION' ON THE FUTURE OF EUROPEAN TOURISM



**The Vienna Declaration on the Future of European Tourism** was launched by ETC President, Arthur Oberascher, at ETC's first Executive Summit, which was held in Vienna on 17th October 2005. The declaration was unanimously adopted by ETC's membership at their General Meeting in Vienna the following day.

The aim of the summit was to highlight the need for concerted action to secure the future of Europe's tourism industry and to examine the economic environment in which tourism and NTOs operate. This year's event focussed particularly on e-marketing and its role in tourism promotion. Dr Oberascher stressed the need for Europe's tourism industry to grasp the opportunities that e-marketing presents.

Dr Oberascher also highlighted an impending shift in international tourism flows with the emergence of new markets in China, India, Russia and Brazil. He emphasised that this put high demands on Europe's 'cultural intelligence'. Meeting these demands was the greatest challenge for Europe's tourism industry.

**The Vienna Declaration** supports policy statements on tourism adopted by the European institutions (the Council, the Commission and the Parliament) and also the Lisbon Strategy, which aims to make the European Union the most dynamic and competitive economy by 2010. ETC members are convinced that tourism can spearhead the Lisbon Strategy, and that the success of the tourism sector is a yardstick for the success of a service and knowledge-based economy.

Paulo Costa, MEP and Chairman of the European Parliament's Transport & Tourism Committee, lent his support to the ETC's aims in a video message which was shown at the international press conference held during the event. ■

The full text of the Vienna Declaration can be found on ETC's corporate site: <http://www.etc-corporate.org> (menu: press — sub menu: current press releases)

### UKRAINE JOINS ETC

Ukraine has become the latest country to join ETC. On the initiative of their president, Arthur Oberascher, ETC's 33 members voted unanimously to invite Ukraine to become a member of ETC at the organisation's autumn General Meeting held in Vienna on 18th October 2005.

The agreement was signed on behalf of Ukraine by Mr Viktor Bezverkhy, General Director of the National Tourism Organisation of Ukraine, and by Arthur Oberascher on behalf of ETC.

Speaking at the signing ceremony, Dr. Oberascher said, "All of Europe's countries are pieces in the mosaic that is Europe's appeal. They are all part of the 'never-ending journey' that is Europe". ■



Pictured here at the signing ceremony are (from l. to r.): Viktor Bezverkhy (Ukraine) with Arthur Oberascher (ETC President) and Rob Franklin (ETC Executive Director).

## ETC MEETING CALENDAR 2006

A regularly updated list of ETC Meetings can be found on our intranet: [www.etc-intranet.org](http://www.etc-intranet.org) under the menu 'Meeting Calendar'.

### FEBRUARY

- 1-3: 20th Annual ETC Research Directors' Meeting** Limassol, Cyprus
- 10: Board of Directors Meeting (N°38)**. Malta

### MARCH

- 9: Research Working Group Meeting** Berlin, Germany
- 20-21: Launch of the visiteurope.com Portal** Vienna, Austria

### APRIL

- 3-4: New Media Group Meeting** Slovakia (t.b.c.)
- 26: Research Working Group Meeting**. Brussels, Belgium (t.b.c.)
- 27: Board of Directors (N°39)**. Brussels, Belgium
- 27: ETC General Meeting (N°70)**. Brussels, Belgium

### JUNE

- 15: Board of Directors (N°40)**. Helsinki, Finland
- 15: Research Working Group Meeting** Helsinki, Finland
- 16: Seminar on City Tourism & Culture** Helsinki, Finland
- 16: ETC - ECT Research Meeting** Helsinki, Finland.

### SEPTEMBER

- 21-22: ETC & ECT TourMIS Users' Workshop & Research Working Group Meeting**. Budapest, Hungary (t.b.c.)

### OCTOBER

- 3: ETC Market Intelligence Symposium** Malta (t.b.c.)
- 4: Board of Directors (N°41)**. Malta (t.b.c.)
- 4: ETC General Meeting (N°71)**. Malta (t.b.c.)
- 5-6: Research Working Group Strategic Meeting**. Malta (t.b.c.)
- 17-20: E-Business Academy 2006** Brunnen, Switzerland

# RESEARCH HIGHLIGHTS



N°3 / January 2006

## COMING SOON

## HANDBOOK ON SEGMENTATION METHODOLOGIES

**Woodward Associates & Luton University** have been selected to develop a new **ETC/UNWTO handbook** on tourism segmentation methodologies. Intended to raise awareness of segmentation and its use in improving the effectiveness of tourism marketing, the handbook is the

third in a series of best-practice guides published jointly by the two organisations.

The research is being co-ordinated by Christian Brandt, Analytic Adviser, VisitDenmark. Work will start shortly and is due to be completed by mid-2006. ■

## MARKET UPDATES

In late 2005, ETC commissioned a series of regular Market Updates for its members. They will be based on a standard template designed by Ireland's Brian Maher in collaboration with the members of the Research Working Group.

The first set of reports will be available in the first half of 2006 and will cover the following long-haul markets: *USA, Canada, Japan, China, Latin America, Russia, India, S. E. Asia, Australasia, Middle East, South Africa.* ■

## NEW MARKET RESEARCH IN CHINA

ETC and UNWTO have commissioned the **European Tour Operators' Association (ETOA)** to carry out a survey on the position and image of Europe as a tourism destination on the Chinese travel market.

The information obtained will allow ETC, UNWTO and their member countries to develop the right marketing message for the Chinese consumer, not least in the European portal [www.visiteurope.com](http://www.visiteurope.com) ■

## ETC NEWS

### PORTAL UPDATE



Work on the new ETC portal [www.visiteurope.com](http://www.visiteurope.com) is continuing apace. Staff from most NTOs have completed their training sessions in Vienna and Bratislava on how to use the CMS (content management system), and they are now inputting their country's data.

The portal will be launched officially on 20th/21st March at a meeting of EU tourism ministers in Vienna. It will feature the new ETC logo and brand and it will replace the current [visiteurope](http://visiteurope.com) website, which was developed by ETC's US Operations Group in 1995.

Invitations to tender have been published for the various services: a media agency, hosting & maintenance, search engine optimisation and a design agency. The selection process for these services has either been completed, or is currently underway. Final decisions on the major tenders will be made by ETC's Board in the first part of 2006.

Development of the new portal was funded by the European Commission under its IDA programme.

## WHO ARE WE ?

The members of the **ETC Research Directors' Group** are the Research Directors from the **34 National Tourist Offices** who are members of ETC.

The Group provides an active forum for the sharing of market intelligence, as well as for the commissioning of new research which is to the benefit of 'Europe' as a whole.

Active collaboration with partners such as the **United Nations World Tourism Organisation (UNWTO)**, **European Cities Tourism (ECT)**, the **European Tour Operators' Association (ETOA)** and the **Tourism Unit of the European Commission** enables the Research Group to lever its budget and maximise its research output.

This newsletter is produced by the European Travel Commission in collaboration with Maison de la France.

Lisa Davies – ETC :  
[lisa.davies@etc-corporate.org](mailto:lisa.davies@etc-corporate.org)

Gaëlle Berréhouc – Maison de la France:  
[gaelle.berrehouc@franceguide.com](mailto:gaelle.berrehouc@franceguide.com)

Editing : Nick Markson – [nickmarkson@tiscali.be](mailto:nickmarkson@tiscali.be)

Photo credits :  
© Maison de la France / Hervé le Gac  
© Maison de la France / Fabian Charaffi

Conception - réalisation : [www.selfmadegroup.com](http://www.selfmadegroup.com)  
[contact@selfmadegroup.com](mailto:contact@selfmadegroup.com)