



RESEARCH HIGHLIGHTS

The Newsletter of the Market Intelligence Group of the European Travel Commission
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In this edition of *Research Highlights*, the Market Intelligence Group (MIG) highlights the work of partner organisations and colleagues from the world of international tourism research. We feature two of our partners, European Cities Marketing (ECM) and the European Travel & Tourism Action Group (ETAG), which have both seen important changes this year. We learn about the Organisation for Economic Co-operation and Development's (OECD's) Tourism Committee and we look beyond Europe at the work of the Pacific Asia Travel Association (PATA).

ETC RESEARCH ACTIVITIES

[The projects marked with an asterisk are joint projects with the World Tourism Organization, the MIG's main funding partner.]

2007 work programme

Indian Outbound Tourism - market study*

Tenders have been invited for the field research for this project and the name of the successful bidder should be known later in the autumn. Desk research has been commissioned separately from the Scandinavian Tourist Board in the Philippines.

visiteurope.com - usability research

The MIG is supporting research which is intended to help the US Operations Group strengthen the impact of the portal in the US market.

Handbook on Branding and Image Promotion*

Work will start before the end of the year on this, the latest in the series of ETC-UNWTO best-practice handbooks.

Market Insights

Four more of these market profiles - on Mexico, South Korea, Thailand and the United Arab Emirates - have been commissioned to add to the eight already published.

Work in progress

Russian Outbound Tourism - market study*

Work has now started on qualitative surveys of consumer opinion, conducted in focus groups.

Handbook on e-Marketing*

This project is nearing completion. Delivery of the final text is expected during the autumn.

Handbook on Market Segmentation Methodologies*

This has just been published.



ETAG

Gareth James, ETAG Secretary

The European Travel and Tourism Action Group (ETAG) has had a long and close association with ETC, on whose initiative it was set up in 1981.

A group of twelve European and international tourism organisations, ETAG aims to act as a forum to strengthen the collective voice of the tourism industry in influencing governmental policies across Europe. It works principally with the institutions of the European Union, co-operating with both the European Commission and the European Parliament. It is also a member of the World Tourism Organization's Business Council.

ETAG

European Travel & Tourism
Action Group

2007 has been a year of change for ETAG. Frederico Costa of Turismo de Portugal has succeeded Jaakko Lehtonen of the Finnish Tourist Board as chairman, and Gareth James has succeeded Bill Richards as secretary. Bill had served the organisation for many years.

Following the change of management, the organisation is reviewing the way in which it works, but without losing sight of the need to improve governments' understanding of, and support for, the tourism industry.

For more information, please visit www.etag-euro.org



OECD

Alain Dupeyras, Head of the OECD's Tourism Programme

The Organisation for Economic Co-operation and Development (OECD) is a forum for the governments of 30 market democracies to compare policy experiences, seek answers to common problems, identify good practice and co-ordinate domestic and international policies.

The OECD's work in tourism policy is overseen by the Tourism Committee, a grouping of officials from national ministries and statistical offices (including some representatives of non-OECD countries).

The Tourism Committee meets twice a year, and also organises occasional ad hoc meetings and conferences. Its main focus is on economic and tourism policy issues. A more coherent worldwide approach to sustainable development by public tourism policy is another priority.

At the heart of the committee's work is its development of best-practice research and guidance on issues commonly faced by tourism administrations in developed countries. The information produced is highly influential, affecting the way that governments organise and evaluate their support for tourism, encourage innovation in the sector and create the conditions needed to stimulate investment and boost competitiveness.

Current projects include:

- best-practice research on the use of data from tourism satellite accounts (TSAs) to inform tourism policy and support business;
- analysis of the role of tourism and culture in making regions/areas more attractive;
- a review of the economic impact on travel and tourism of border security measures, and the policy implications;
- two new publications, *Entrepreneurship and Innovation in Tourism* and *Tourism in OECD countries 2008: Trends, Policies and Globalisation*; and
- a high-level meeting in 2008 on globalisation and tourism policy.

For more information, please visit www.oecd.org/cfe/tourism or e-mail tourism.contact@oecd.org.



EUROPEAN CITIES MARKETING

Hans Dominicus, Chairman of the ECM Research and Statistics Working Group

European Cities Marketing (ECM) was formed on 1st January 2007 by the merger of European Cities Tourism (ECT) and the European Federation of Conference Towns (EFCT). It brings together more than 130 major cities from 30 European countries.

The new organisation is divided into two parts:

- the **Conventions Forum** - which supports convention bureaux (CVB) and destinations by running activities such as the *Meet Europe* event and the summer school for young CVB staff; and
- the **Tourism Forum** - which runs working groups on information technology, research and statistics, communication and PR, and city cards. Activities include a city break exhibition, a major conference, seminars and research studies.

Both forums' research programmes are run by ECM's Research and Statistics Working Group (R&S-WG). They include marketing case studies, creation of a standardised questionnaire for members' visitor surveys (allowing direct comparison of results across Europe) and development of city statistics in the TourMIS website, which is managed by Karl Wöber of Vienna's Modul University and funded jointly by ETC and the Austrian National Tourist Office.

The R&S-WG is a partner of ETC's Market Intelligence Group. From 2008, for the first time, it will make a financial contribution to the MIG's annual research programme.

For more information, go to www.europeancitiesmarketing.com



PATA

The Pacific Asia Travel Association (PATA) is a non-profit-making membership organisation created to promote the responsible development of travel and tourism in the Asia/Pacific region. Its members include 100 government, regional and city tourism bodies, more than 55 international airlines and cruise lines, and several hundred travel industry companies.

Founded in 1951, PATA has its headquarters in Bangkok and representative offices in Australia, China, Dubai, Germany and the United States. It also has 39 chapters worldwide (seven in Europe), which provide networking opportunities for tourism professionals working in Asia/Pacific tourism.

PATA's research and market intelligence work is co-ordinated by the Strategic Intelligence Centre in Bangkok. The centre has a staff of four who, between them, produce information ranging from statistical reports and tourism forecasts to market reports.

The latest projections of travel demand are contained in the newly published, *Asia Pacific Tourism Forecasts 2007 to 2009*. Recent market intelligence includes in-depth studies of the Russian and Indian markets and shorter *Market Snapshots* about outbound tourism from Hong Kong and Japan. Two brand-new *Market Snapshots* about Australia and the USA will be available before the end of the year.

Information about all PATA publications can be found at www.pata.org/catalogue



Dates for MIG Diaries, 2007/8

24 October (a.m.)	Market Intelligence Committee meeting, Pisa
24-26 October	IPK World Travel Monitor Forum, Pisa
5 December (tbc)	Market Intelligence Committee meeting, Amsterdam
6-7 December	ETC/UNWTO Seminar on Segmentation Methodologies, Amsterdam
6-9 February	22nd Annual Market Intelligence Group meeting, Split

ETC Market Intelligence Group

The members of the MIG are the research directors of ETC's 38 member NTOs. The group provides a forum for the sharing of market intelligence, as well as for the commissioning of new research which is for the benefit of 'Europe' as a whole. Its work programme is steered by the *Market Intelligence Committee*, a small sub-committee of volunteers from the full group.

Collaboration with partners such as the UNWTO, ETAG, European Cities Marketing, the European Tour Operators Association and the Tourism Unit of the European Commission enables the MIG to augment its budget and maximise its research output.

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