Improving the Visa Regimes of European Nations to Grow Tourism
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A view from the European Travel Commission

Brussels, November 2015
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Foreword

Europe is at a cross-road. How open are the nations of Europe to welcoming those from beyond our borders? Some nations may choose a more restrictive approach to admitting foreigners in the future. Others may choose a more liberal approach.

If we are interested in growing our share of global tourism then there is only one correct path to follow – that of increased openness. I do not mean we should grant blanket permission for all to enter, and I certainly do not mean that we should ignore national security and immigration concerns. What I mean is that we need to make it easier than it is currently for leisure tourists and other legitimate travellers to come here and to come back again.

Europe is losing share of global tourism arrivals. Our visa regimes are a contributory factor in this decline. It is within our power to change this and to improve our Continent’s tourism competitiveness. The European Travel Commission has done the maths – there is a significant economic prize worth seizing. I ask you to take the time to read our analysis and to consider the courses of action we outline. It is the citizens of Europe who stand to benefit.

Peter De Wilde  
President of the European Travel Commission  
CEO, Visit Flanders

Mark Henry  
Vice President of the European Travel Commission  
Director, Tourism Ireland
Europe’s tourism challenge

Europe has been the world’s leading tourism destination since records began. The European continent welcomed over 580 million international tourists in 2014 who spent €385 billion during their stays.1 Just over half (51%) of all the world’s tourist arrivals were to Europe. Over 9% of Europe’s GDP comes from tourism (directly or indirectly), and the sector employs nearly 35 million people in the region.2

However Europe is losing share. Within a few years, the continent is expected to host the minority of the world’s tourists for the first time in history.3 Although this share decline abated in the past few years with the help of a weaker Euro and political instability in neighbouring countries; long-term growth projections forecast an annual increase of 2.3% in European tourist arrivals through to 2030, a much slower pace than the projected world average of 3.3%. This will inevitably result in a continued decline in our share of the international travel market, as tourism grows faster in emerging world regions.

Figure 1: International Tourism Growth: Actual and Forecast 1950-2030


1. UNWTO, World Tourism Barometer, Volume 13, August 2015 (provisional figure 2014)
3. UNWTO, Tourism Towards 2030
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The European Union has identified the challenge that nearly 90% of all international travel to the EU comes from within the region, compared to just 73% and 75% in Asia and the Pacific and the Americas respectively. This has a tangible impact on tourism earnings as long-haul travel is typically associated with longer stays and higher spend. Destinations in Europe earn just €660 per international arrival, compared to an average of €1,080 for destinations in Asia and the Pacific, and €1,140 in the Americas. The European Commission has concluded that increased marketing efforts across a wider range of markets, especially from long-haul, is needed to attract new tourists and to improve the profitability of the European tourism sector.

The European Travel Commission (ETC) is the body that unites 32 of Europe’s national tourist organisations (NTOs). Its primary role is to promote leisure tourism into the continent of Europe. ETC agrees wholeheartedly that Europe needs to increase its appeal to residents in long-haul destinations if it is to reap the rewards of strong tourism growth. Marketing and promotion has an important role to play in this respect. So too does air access development. And the availability of sustainable tourism product is increasingly important to secure the sector’s future. Together, developments in these spheres will make Europe a more attractive place to visit and one that is easier to get to.

Even if long-haul tourists want to come here, and even if they have the means of doing so, many however face the hurdle of securing a visa to visit. Visa obligations can deter legitimate leisure and business tourists due to the complicated processes, processing times and expense associated with obtaining a visa. Modern travellers show a tendency to shorter booking lead times, and, accordingly, are more likely to choose destinations that require limited planning.

This is a hurdle whose height is within our own control. The harder it is for potential tourists to secure a visa, the greater the share of global tourism that Europe will lose. The easier it is for tourists to access European destinations, the greater the economic benefit and job creation that flows to our economies.

It is the view of ETC that liberalisation of Europe’s many visa regimes for leisure travellers is essential for the Continent to maximise its share of the benefit from global tourism growth in the decades ahead.

5. Ibid.
Europe’s current visa regimes

Three-quarters of the world’s population need to obtain a visa ahead of a visit to Europe according to the UNWTO. In a global comparison, the organisation describes Europe’s visa regimes as “among the more restrictive”.6

Figure 2: Tourism visa openness index by country, 2014

Note: The higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world’s population exempt from obtaining a visa, with the percentages of no visa by 1, visa on arrival weighted by 0.7, eVisa by 0.5, and visa required weighted by 0.


The European Travel Commission estimates that 44% of all long-haul travellers that actually arrived in Europe in 2014 required a visa to do so.7 Visas were also required for travel from the large short-haul markets of Russia, Turkey and Belarus, amongst others. In total, therefore, 56% of visitors to European destinations from non-European markets required a visa for travel here.

ETC recognises the importance of visas as essential tools for government to ensure security and to control immigration. Nevertheless, targeted liberalisation for leisure and business travelers, amongst others, would improve our competitiveness and deliver tangible tourism benefit.

7. European countries are defined here as including all EU and Schengen countries, plus Albania, Bosnia & Herzegovina, Macedonia, Montenegro and Serbia.
Schengen area countries

The Schengen Area comprises 26 European countries who have agreed to allow free movement of their citizens between each other. Of the participating countries, 22 are part of the European Union and the other 4 are part of the European Free Trade Association (EFTA). Those who require a visa to visit a Schengen country can apply for a Uniform Schengen Visa. This permits travel to one of the Schengen Area Member Countries to transit or reside in the desired territory for a certain period of time up to the maximum of 90 days every six month period starting from the date of entry. This visa allows holders to visit any of the Schengen participating countries during their stay.

The citizens of many countries in North and South America are able to visit the Schengen area visa-free for up to 90 days (in any 180 day period). However citizens of most countries in the world must apply for a visa to holiday here, as the map below highlights.

Figure 3: Visa requirements for travel to Schengen countries by source market

The introduction of the Schengen Area has undoubtedly contributed significantly to boosting travel within Europe since its inception in 2001. The continued growth in the list of nations whose citizens can access the Area visa-free is strongly welcomed by the ETC. This on-going liberalisation helps build Europe’s competitive position in the global tourism market.

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8. The European Union (EU) member states who are participants in the Schengen Area are Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain and Sweden. The four non-EU members are Iceland, Liechtenstein, Norway and Switzerland.
European Union members who are not covered by Schengen

There are currently six European Union member states who are not members of the Schengen Area. Four of these are obliged to join the Area and are working towards this, namely Bulgaria, Croatia, Cyprus and Romania. These countries already implement common visa requirements with the Schengen Area, thereby ensuring that citizens of other countries have the same visa requirements when visiting one of these four as they do if visiting a Schengen state.

Two member states have opted-out of Schengen participation – the United Kingdom and Ireland – although they operate a common travel area with minimal or no border controls between them. United Kingdom and Irish visa policy is very similar to that of the Schengen countries in respect of their identification of short-stay visa-free travel countries and of those requiring visas.

In July 2011 Ireland introduced a pilot visa waiver programme under which the need for an Irish visa is waived for certain nationalities who hold valid a UK visa and who visit via the UK. In October 2014 the British and Irish governments went further and introduced a joint visa scheme entailing mutual visa recognition for Chinese and Indian nationals. This facilitates free travel for these citizens across Britain and Ireland. ETC welcomes the proposal to extend this system over time to all countries requiring visas to enter the UK or Ireland.

Non-EU members who are not covered by Schengen

There are other European countries that are neither EU member states nor members of the Schengen Area. Monaco and San Marino fall into this category but are considered de facto to be within the Schengen area as they do not have border controls. Albania, Bosnia-Herzegovina, Kosovo, Macedonia, Montenegro and Serbia also fall into this category and most of these states operate independent visa policies that align relatively closely with that of other European countries. The citizens of these countries are also permitted short-term visa-free access to the Schengen countries. The “wider Europe” that consists of these countries, the EU nations and other Schengen member states, all stand to benefit similarly from improvements in their visa regimes with countries further afield.

Turkey, Russia, Belarus, Ukraine, Moldova and other former Soviet states are significant source countries for tourism to the EU and Schengen countries and yet are subject to strict visa controls. Visa liberalisation between other European states and these countries therefore offers good potential for leisure tourism growth and related economic benefit.

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Europe’s visa geography

The Schengen Area receives the vast majority of visits to Europe from countries that require a visa (85%). The EU countries outside of Schengen account for a further 8% of these visits, with the balance (8%) of tourists visiting the other European countries from "wider Europe".

Figure 4: Europe’s visa geography: the EU, Schengen members & other countries

Of the 39 European countries that fall into one or other of these categories, the national tourist boards of 32 of them are members of the European Travel Commission. ETC asks that all of these nations work both individually and together to reduce the proportion of the world’s population that need a visa to visit and, by doing so, improve the competitive position of Europe as a global tourism destination.

11. The one ETC member country that does not appear here is Turkey as it is a significant tourism source market for other European countries whose citizens are subject to visa requirements.
Proposed improvements in visa regime

The European Travel Commission is not alone in identifying the value of visa liberalisation for international tourism growth. The United Nations World Tourism Organization, the World Travel & Tourism Council and the European Commission have all identified opportunities for liberalisation that would deliver tourism benefit.

Opportunities identified by the UNWTO & WTTC

The United Nations World Tourism Organization (UNWTO) is the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism. The World Travel & Tourism Council (WTTC) is a forum for the travel and tourism industry consisting of individuals from the global business community.

In 2012 both organisations published a joint report on the impact of visa facilitation on job creation in the G20 economies. The heads of the two organisations expressed their belief that “visa facilitation is central to stimulating economic growth and job creation through tourism”.

Figure 5: Impact of visa facilitation on the G20 economies (%increase over baseline)

Note: Growth above the baseline scenario.


Their economic analysis identified the potential to create 5.1 million additional jobs in the G20 economies through reforms in visa facilitation. In a high impact scenario, the G20 would see growth in tourist arrivals of 16% and an increase in international tourism receipts of 21% above the baseline forecast in just three years. This represented a gain of 112 million additional
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international tourists, spending US$206 billion in additional receipts and creating 3.1 million additional direct tourism-related jobs and 5.1 million jobs in total (when including direct, indirect and induced impacts).

The two organisations identified five opportunities for countries to improve visa facilitation in order to realise these growth opportunities, as the table below summaries.

<table>
<thead>
<tr>
<th>Table 1: UNWTO &amp; WTTC Visa Facilitation Opportunities</th>
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</thead>
<tbody>
<tr>
<td><strong>Opportunity 1: Improve delivery of information</strong></td>
</tr>
<tr>
<td>- Improve customer service and communication</td>
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<tr>
<td>- Increase information sharing among (and within) governments</td>
</tr>
<tr>
<td>- Leverage the internet to deliver information to customers</td>
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<tr>
<td><strong>Opportunity 2: Facilitate the process to obtain visas</strong></td>
</tr>
<tr>
<td>- Reduce documentation and interview requirements</td>
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<tr>
<td>- Increase visa processing capacity</td>
</tr>
<tr>
<td>- Leverage technology and other support measures to increase efficiency and speed of visa issuance and enhance security</td>
</tr>
<tr>
<td>- Issue visas on arrival</td>
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<tr>
<td>- Initiate visa waiver programmes</td>
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<tr>
<td><strong>Opportunity 3: Differentiate treatment to facilitate tourist travel</strong></td>
</tr>
<tr>
<td>- Leverage visa free travel for holders of a visa issued by a third country</td>
</tr>
<tr>
<td>- Extend the validity and entry limits of visas</td>
</tr>
<tr>
<td>- Extend visa facilitation for certain types of visitors</td>
</tr>
<tr>
<td>- Visa facilitation for specified tourism areas</td>
</tr>
<tr>
<td><strong>Opportunity 4: Institute eVisa programmes</strong></td>
</tr>
<tr>
<td><strong>Opportunity 5: Establish regional agreements</strong></td>
</tr>
</tbody>
</table>

The European Travel Commission supports the view of these organisations that visa facilitation offers significant economic benefit to countries. We therefore join with them in encouraging governments to proactively embrace the visa facilitation opportunities outlined by the UNWTO and WTTC.

Proposals from the European Commission

In 2012 the European Commission acknowledged, for the first time, the need to consider the economic impact of visa policy on the wider EU economy, and in particular on tourism. The Commission subsequently proposed a range of improvements in the Schengen visa scheme,

alongside the creation of a new touring visa, to facilitate greater tourism visitation.\textsuperscript{14}

ETC strongly welcomes the European Commission’s recognition of the opportunity that visa liberalisation offers Europe. The range of improvements in the Schengen visa scheme that the Commission has proposed are summarised in the table below.

\textbf{Table 2: Schengen Visa Improvement Proposals from the European Commission}

\begin{tabular}{|l|}
\hline
\textbf{Improve the Nature of Visas Available} \\
Establishment of a touring visa \\
- Increasing the number of days the visa is valid for (i.e. more than 90 days travel within 180 days in a year) \\
- Greater facilitation to visit close relatives who are EU citizens in their country \\
- Visas on Arrival: allow short-term single-entry visa issuing at borders \\
- Differentiation of treatment: mandatory improvements for those with a positive visa history: i.e. \\
  (i) no repeat lodging in person, \\
  (ii) no repeat fingerprint collection, \\
  (iii) minimal documentation requirements – i.e. only proof of travel purpose, and \\
  (iv) issue of Multiple Entry Visas of increasing length. \\
\hline
\textbf{Reduce the Administrative Burden} \\
- Clarity on the competent member state to issue \\
- Simplified application forms \\
- Reduced list of supporting documentation \\
- Elimination of ‘lodging in person’ for repeat visitors \\
- Allowing on-line submission \\
- Allowing applications 6 months prior to visit (versus 3 months currently) \\
- Reduced response time to 5 calendar days (from 7 currently) \\
- Eliminate medical insurance requirement \\
\hline
\textbf{Increase the Ease of Access} \\
- More Common Application Centres in countries overseas \\
- Authorisation of Honorary Consuls to collect applications \\
- Significant growth in consular office coverage in source market countries \\
\hline
\end{tabular}

ETC supports the implementation of all of the Commission’s proposals. It is our belief that their adoption by member states will deliver significant economic benefit. We therefore encourage a positive disposition towards their implementation in as short a time frame as is practically feasible.

\textsuperscript{14} In COM(2014)163, 164 & 165.
Opportunities for non-Schengen countries

Although 24 of ETC’s member countries are members of the Schengen area, nine member countries are not. Some of these countries have their own international agreements in place to encourage long-haul travel. Ireland and the United Kingdom, for example, have a scheme in place for China and India that entails reciprocal recognition of each other’s short-stay visas. Schemes such as these suggest a raft of further innovations, in addition to those currently suggested for Schengen countries, that could be applied by non-Schengen nations. The table below highlights a range of these proposals.

Table 3: Visa Facilitation Proposals for Non-Schengen Countries

<table>
<thead>
<tr>
<th>Improve the Nature of Visas Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Extend the valid time length of visas issued</td>
</tr>
<tr>
<td>- Visas on Arrival: allow short-term single-entry visa issuing at borders</td>
</tr>
<tr>
<td>- Differentiation of treatment with mandatory improvements for those with a positive visa history in any other European country</td>
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<table>
<thead>
<tr>
<th>Reduce the Administrative Burden</th>
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<tbody>
<tr>
<td>- Have a single multilingual information site for all European visa information</td>
</tr>
<tr>
<td>- Simplified application forms and reduced lists of supporting documentation</td>
</tr>
<tr>
<td>- Introduce a single application form for Schengen visas and for non-Schengen visa countries where they share common application centres</td>
</tr>
<tr>
<td>- Allowing on-line submission and eliminating ‘lodging in person’ for repeat visitors</td>
</tr>
<tr>
<td>- Reduce visa costs to no more than Schengen level</td>
</tr>
<tr>
<td>- Issue digital eVisas rather than paper ones</td>
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<table>
<thead>
<tr>
<th>Greater Visa Liberalisation</th>
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<tbody>
<tr>
<td>- Grow the number of countries with visa waiver agreements in order to reduce the number of countries requiring visas of any sort</td>
</tr>
<tr>
<td>- Regional agreements to implement common travel areas</td>
</tr>
<tr>
<td>- Mutual recognition of Schengen visas held by citizens of select trusted countries</td>
</tr>
<tr>
<td>- Align the list of countries requiring visas amongst Schengen members and non-Schengen member countries</td>
</tr>
<tr>
<td>- Abolish the need to apply for a visa where the applicant already has residency (but not citizenship) of another European state</td>
</tr>
</tbody>
</table>

The European Travel Commission endorses the economic benefits to be gained from implementing proposals such as these. We encourage European countries that are not members of Schengen to fully explore the opportunities offered by these proposals to grow their share of international tourism.
The single most impactful liberalisation proposal

One solution to Europe’s market share decline is recognised by all the representative organisations in tourism: European nations must positively encourage more long-haul leisure travel. The single most impactful action that nations can take to facilitate this is to grow the number of countries with whom they have visa waiver agreements in order to reduce the number of tourists requiring visas of any sort. ETC encourages all European countries to proactively commit to a programme of visa liberalisation that will deliver direct benefit to their economies and to their citizens.
The benefits of improvement

The European Travel Commission has, for the first time, identified the tourism and economic benefits that visa liberalisation offers European countries. Our analysis is unique in so far as it offers a true pan-European perspective. It also covers a wide variety of source markets that, together, account for the majority of visa-constrained visits to Europe. Furthermore, we have identified the degree of benefit that different types of visa liberalisation offer.

The economic analysis was completed on our behalf by Tourism Economics. Fifty four case studies of national visa change were examined, including 120 detailed country-to-country flows, to compare actual growth or decline in tourism flows following a change in national visa policy. The case studies included movements from visa on arrival to eVisa, adherence to best practice through reduction of fees and increase of visa validity, and complete abolition of all visa types. In some cases, these changes apply to only a small number of countries, and in some these changes apply across the board. The results demonstrated overwhelming positive impacts from visa facilitation policies.

Ten priority source markets, accounting for more than half (53%) of the visa-constrained visits to European destinations, were selected in order to model the economic benefit of liberalisation. These priority markets, roughly in order of their market size for European travel, are: China, Russia, India, Turkey, Indonesia, Belarus, Tunisia, Saudi Arabia, South Africa and Thailand. These were selected both for their current market size and for their growth potential as well as their propensity to travel.

Targeted policy efforts towards just these countries would produce large benefits for the European tourism sector, lifting arrivals from just these markets by up to 70% over a number of years. With a narrow focus by market, this would not compromise the security or immigration functions of visas for any other source markets.

15. The European Comission 2013 study ("Study on the economic impact of short stay visa facilitation on the tourism industry and on the overall economies of EU Member States being part of the Schengen Area"), for example, only studied benefits for liberalisation within the Schengen Area.
The type of visa facilitation policy change is important. More rapid growth in tourism demand can be achieved by bringing visa processes in line with current ‘best practice’. This involves offering easier access to existing visas, including lower fees, simpler paperwork and processes and better use of existing information (for example between airlines and visa issuing bodies). Increasing validity periods of existing visas and offering easier processes for those who have successfully applied for a visa in the past would also have similar impacts.

Adopting these types of ‘best practice’ policies for the ten profiled markets would generate more than 3 million additional visitors for European destinations (above the baseline projection of no policy change) by 2020. This would involve a cumulative total of 13 million additional visitor arrivals over period to 2020, and €18 billion in associated tourism spending.
Offering new visa types, such as eVisa or visa on arrival, further reduces the burden on potential travellers with a stronger observed growth premium in subsequent years. This would generate 8.5 million more visitor arrivals in 2020, and a cumulative total of 33 million extra visits and €45 billion in additional spending over the complete period.

The largest benefits are estimated for a complete visa waiver for these markets, in which case nearly 19 million arrivals above the baseline projection would be expected by 2020. Over the period to 2020 this would involve a cumulative total of 84 million new visitor arrivals for European destinations and €114 billion new revenue.

### Table 4: Types of Visa Facilitation Policies

<table>
<thead>
<tr>
<th>Visa policy change</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best practice</td>
<td>This involves offering easier access to existing visas, including lower fees and simpler paperwork and processes. Better use of existing information is also covered here, including greater sharing of information between different stakeholders, for example between airlines and visa issuing bodies; and also offering easier visa processes for those who have successfully applied for a visa in the past for that country, or a partner destination. Increasing validity periods of existing visas are also included.</td>
</tr>
<tr>
<td>New visa types</td>
<td>New visa types are included here, which are easier for potential travellers to gain and have notable impacts on travel volumes. Notably, this includes eVisas which can be applied for online without the need for a physical presence at a visa office. Visa on arrival is also included which further reduces the burden of advance application.</td>
</tr>
<tr>
<td>Visa-free travel</td>
<td>Visa waivers are typically offered to potential travellers from trusted source markets and have been seen to have the largest positive impacts.</td>
</tr>
</tbody>
</table>

The largely long-haul constrained source markets tend to stay longer and spend more per day than average source markets and would provide relatively large benefits in terms of revenue for the sector. Significant economic impact would be derived from this spending, both directly within the Travel & Tourism sector and also within the wider economy. Under a scenario of visa free travel for the ten focus source markets an additional 600,000 jobs would be created by 2020, including all wider impacts through the supply chain and the spending of extra earnings by those directly employed.
Our analysis outlines the economic argument clearer than ever before. Visa waivers are not feasible in all cases for political or security reasons, of course. Nevertheless, at a time when Europe needs to create new employment, particularly amongst our youth, pro-tourism policy initiatives can deliver a strong return on investment and can do so in a relatively short timeframe.

Table 5: The Benefits of Visa Liberalisation for Europe (Cumulatively 2015-2020)

<table>
<thead>
<tr>
<th></th>
<th>For the Schengen Area</th>
<th>For the EU28</th>
<th>For Wider Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Best practice</strong></td>
<td>10.9 million additional arrivals, spending €14.4 billion, generating 66,000 jobs</td>
<td>12.3 million additional arrivals, spending €16.3 billion, generating 83,000 jobs</td>
<td>13.3 million additional arrivals, spending €18.3 billion, generating 95,000 jobs</td>
</tr>
<tr>
<td><strong>New visa types</strong></td>
<td>28.3 million additional arrivals, spending €37.1 billion, generating 181,000 jobs</td>
<td>30.9 million additional arrivals, spending €40.5 billion, generating 213,000 jobs</td>
<td>33.1 million additional arrivals, spending €45.2 billion, generating 238,000 jobs</td>
</tr>
<tr>
<td><strong>Visa-free travel</strong></td>
<td>72.6 million additional arrivals, spending €94.6 billion, generating 477,000 jobs</td>
<td>79 million additional arrivals, spending €103.1 billion, generating 557,000 jobs</td>
<td>84.1 million additional arrivals, spending €113.8 billion, generating 615,000 jobs</td>
</tr>
</tbody>
</table>

Source: Tourism Economics
Our recommendations for action

It is the view of the European Travel Commission that liberalisation of Europe’s visa regimes for leisure travellers is essential for the Continent to maximise its share of the benefit from global tourism growth in the decades ahead. We document here a range of practical initiatives that can be put in place to deliver this in ways that avoid compromising security or immigration control. We have also clearly demonstrated the economic value that will flow from ever greater degrees of liberalisation. We now encourage action to realise that value.

ETC’s calls for action

1. We encourage all European countries to proactively commit to a programme of visa liberalisation for leisure and business travellers that will deliver direct benefit to their economies and to their citizens.

2. We encourage countries to preserve existing visa freedoms and not to increase the barriers for potential tourists. In particular, we encourage Schengen Area countries to protect the principle of freedom of movement that offers Europe a current competitive advantage.

3. We encourage support for the European Commission’s proposals for further liberalisation of the Schengen visa regime. As this will enhance Europe’s tourism competitiveness, we encourage their adoption in as short a time frame as is practically feasible.

4. We encourage the adoption of ‘best practice’ improvements to ease the administrative burden for tourists, in particular the implementation of simplified application processes, reduced application fees, and lengthening visa validity.

5. We encourage the greater deployment of new visa types, in particular greater adoption of electronic visas and visas on arrival.

6. We encourage continued growth in the list of nations whose citizens can access Europe visa-free, as this offers Europe the most positive economic impact.

The prize on offer is significant – up to 84 million new visitor arrivals, €114 billion in revenue, and more than 600,000 additional jobs over the next six years – and that is only accounting for travel from the ten countries that we have profiled in-depth. This is a prize worth fighting for. Europe should act now.
What is the European Travel Commission?

The European Travel Commission (ETC) is the non-profit organisation responsible for the promotion of Europe as a tourist destination in third markets. Our 32 member National Tourism Organisations work together to build the value of tourism to all the beautiful and diverse countries of Europe through, in particular, cooperating in areas of sharing best practices, market intelligence and promotion.

Originally established in 1948, ETC has been promoting Europe internationally for over 60 years, and currently undertakes consumer advertising in selected overseas markets, public relations, trade promotions, market research, professional development for members, and liaison with other relevant agencies such as the European Commission, the United Nations World Tourism Organization (UNWTO), and the Organisation for Economic Co-Operation & Development (OECD).

The ETC’s current members are from Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Monaco, Montenegro, Norway, Poland, Portugal, Romania, San Marino, Serbia, Slovak Republic, Slovenia, Spain, Switzerland and Turkey.
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