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**“Destination Europe:
how to keep Europe at number one?”**

by Eduardo Santander

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Although numbers and flows continue to show positive trends, especially regarding the long-haul markets, European tourism industry needs to face the increased (and increasing) competition from emerging destinations: Europe needs to be prepared and try to respond as much as possible to the requests of tourists, so as to capitalize efforts done until now in order to keep tourism as one of the leading sector of the entire continent's economy.

European Travel Commission (ETC) started its activity in 1949, just one year after its creation as no profit organisation for the promotion of Europe as tourism destination in the third countries. The organisation, created by "only" 19 countries, could boast today 33 members throughout Europe that contribute to develop the mission of ETC.

When thinking about the best strategies to continue developing European tourism, ETC started studies about the image of Europe as a tourist destination and analysed if a brand could be created and be useful to enhance the image of the whole Europe: the main conclusion was that Europe firstly needs a joint promotion strategy able to create an umbrella

for all ETC national tourism organisations members while presenting countries' peculiarities.

Thanks to a strong cooperation with the European Commission, ETC received funds in the period 2012-2014 (also in 2015 under a new grant) to launch the "Destination Europe" strategy. Its development pass through three main pillars: the promotion of values and unique selling points of Europe as a destination, the capitalisation on delights and the elimination of legal and perceptual barriers, and the promotion of Europe with a Pan-European approach. The whole strategy should help to stimulate competitiveness and to develop and promote sustainable thematic tourism products that could contribute to the growth of European tourism sector.

Through the presentation of the European Travel Commission and the Destination Europe strategy, the article gave an overview on the key elements that need to be enhanced and managed in order to keep Europe as the main tourism destination in the world, facing all the economic and social challenges that future years could present.

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“Destination Europe: come mantenere l'Europa al primo posto?”

di Eduardo Santander^δ

Sebbene numeri e flussi mostrino un continuo trend positivo, specialmente per quanto riguarda i mercati a lungo raggio, l'industria del turismo in Europa deve confrontarsi con la cresciuta (e crescente) competizione sul mercato che deriva dall'ingresso di nuove destinazioni: l'Europa deve essere pronta nel provare a rispondere quanto più possibile alle richieste ed ai bisogni dei suoi turisti, così da capitalizzare gli sforzi fatti sino ad ora per mantenere il turismo uno dei settori leader per l'economia dell'intero continente.

L'European Travel Commission (ETC) iniziò la sua attività nel 1949, solo un anno dopo la sua creazione come organismo no profit per la promozione dell'Europa come destinazione turistica in paesi terzi. L'organizzazione, nata con "soli" 19 paesi, vanta oggi 33 membri europei che contribuiscono a portare avanti la missione dell'ente.

Quando si è iniziato a pensare alle strategie migliori per continuare a sviluppare il turismo europeo, l'ETC ha avviato una serie di studi riguardanti l'immagine dell'Europa come destinazione turistica, analizzando le potenzialità di creazione di un brand unico utile a migliorare la visione dell'intera Europa: emerse, su tutto, la necessità di identificare prima una comune strategia di promozione

capace di creare un "ombrello" per tutti i membri di ETC ed al contempo far emergere le peculiarità di ogni singolo paese.

Grazie ad una importante collaborazione con la Commissione Europea, l'ETC ha ricevuto fondi nel periodo 2012-2014 (anche nel 2015 grazie ad un differente finanziamento) per lanciare la strategia "Destination Europe". Il suo sviluppo poggia su tre principali pilastri: la promozione di valori e la "vendita" dell'Europa come unica destinazione, la capitalizzazione delle eccellenze e l'eliminazione di barriere legali e, più in generale, percepite, e la promozione dell'Europa con un approccio Pan-Europeo. L'intera strategia dovrebbe aiutare a stimolare la competitività ed a sviluppare e promuovere prodotti turistici tematici e sostenibili che possano contribuire alla crescita del settore turistico europeo.

Tramite la presentazione dell'European Travel Commission prima e di Destination Europe poi, l'articolo fornisce una panoramica sui principali elementi che devono essere migliorati e gestiti affinché l'Europa continui ad essere la principale destinazione turistica al mondo, capace di affrontare le sfide economiche e sociali che potrebbero verificarsi nei prossimi anni.

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1. Introduction

The European Travel Commission was created by 19 countries in 1948 to promote Europe as a destination to long-haul tourism markets outside Europe. The organisation was set-up under the post war Marshall Plan to rebuild Europe's tourism industry. The first promotional campaign began as early as 1949 and since then the European Travel Commission has been promoting Europe internationally for more than 60 years.

It is interesting to notice the parallel in the historical situations in 1948 and now, when Europe is struggling with the economic crisis, especially bearing in mind that tourism is one of the most important sectors of the industry, contributing directly and indirectly to 10% of the GDP.

ETC's mission is to strengthen the sustainable development of Europe as a tourist destination and to increase competitiveness, through knowledge gathering and sharing amongst members and lobbying as well as by establishing a professional marketing platform

for the successful promotion of member countries in long-haul markets.

Currently the organisation has 33 members throughout Europe.

Special focus in recent years was the excellent working relationship with the European Commission, which led to the common initiative “Destination Europe 2020”. This new agreement with the EC can be considered a milestone for ETC and it is the basis for a long term strategy to strong position Europe in the global tourism market place.

In 2011, Antonio Tajani, former Vice-President of the European Commission and Commissioner for Industry and Entrepreneurship, and ETC signed a Joint Declaration between the two organisations. The basis of the document was defined in the European Commission's communication Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe and in the European Travel Commission's gradual strategic shift towards the promotion of Destination Europe in emerging markets.

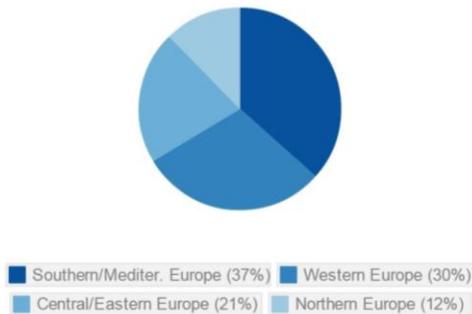
2. Status Quo of European Tourism

It is widely acknowledged that Europe is the world's number 1 tourist destination. With 588 million international tourist arrivals in 2014, Europe holds a market share of 52% (UNWTO Barometer, 2015). The past year 2014 particularly painted a promising picture for the future as Europe attracted an estimated 22 million more international arrivals, resulting in a positive

increase of 3.9% - well above the region's long-term trend. Many destinations benefitted from increased travel from Europe's top markets, but more significantly long-haul markets led growth in 2014. Looking ahead, the future of the tourism sector appears prosperous – UNWTO forecasts international tourist arrivals to Europe to accumulate to 745 million by 2030 (UNWTO - Tourism Towards 2030).

Fig. 1 - Europe recorded 588 million international tourist arrivals in 2014

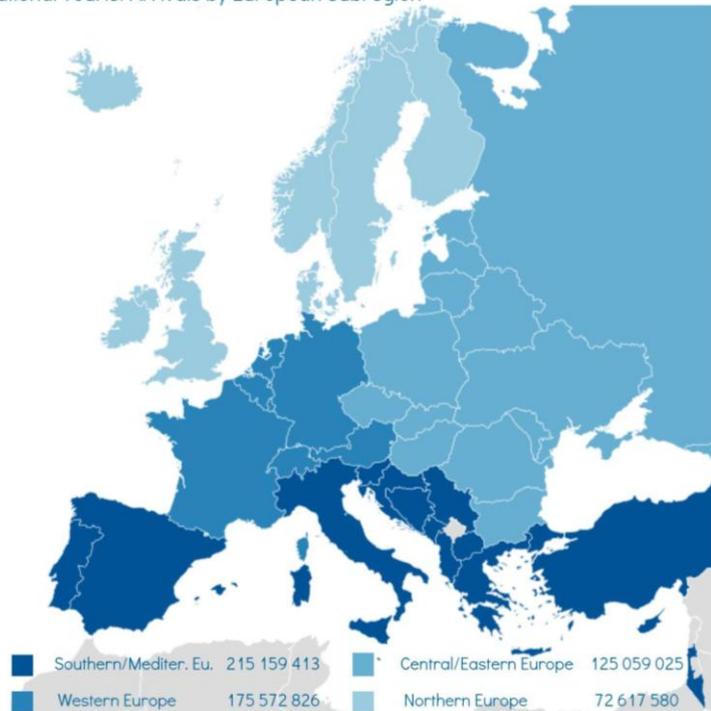
Regions' share of international tourist arrivals in Europe



Growth in international tourist arrivals in 2014 (% on previous year)

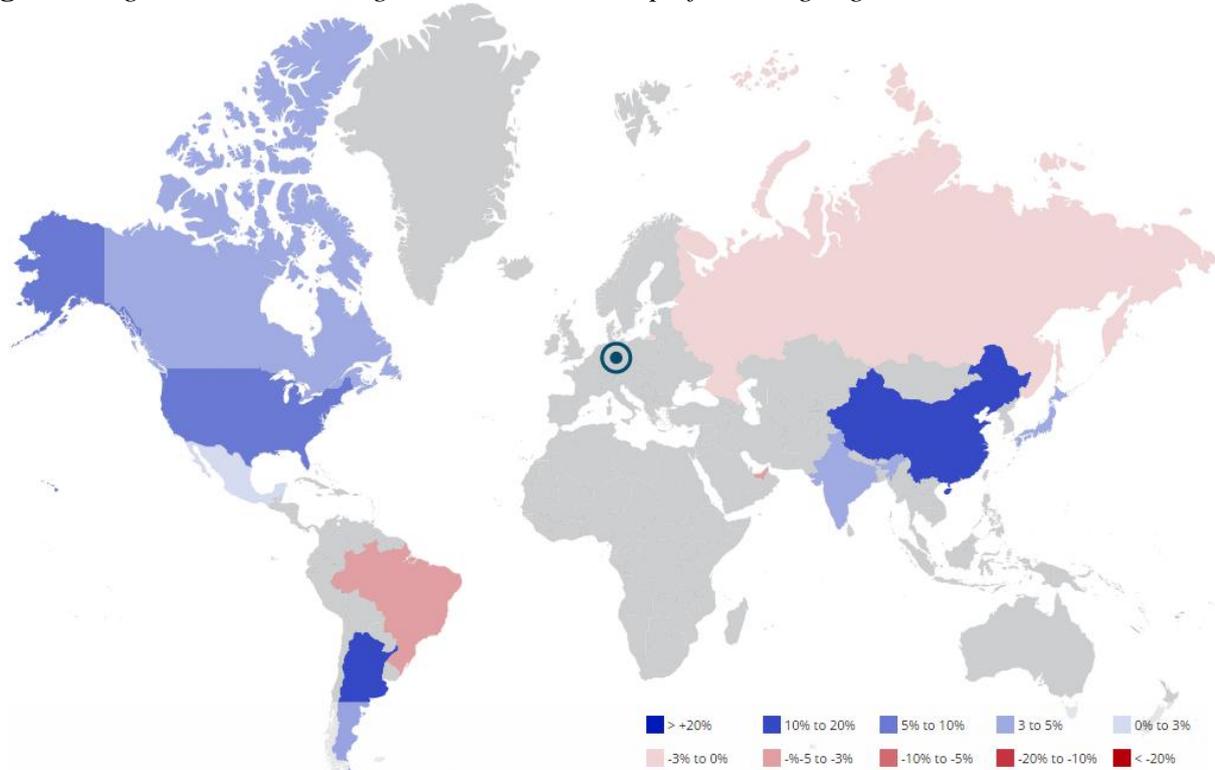


International Tourist Arrivals by European Subregion



Source: ETC (2015) Executive Dashboard, Tourism Economics.

Fig. 2 - Long-haul markets led growth in 2014, on top of a strong regional market



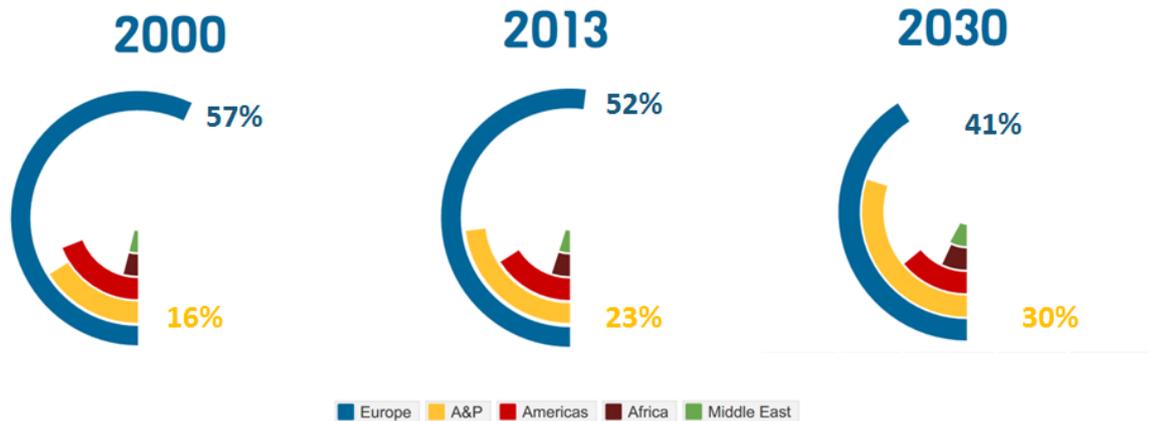
Source: ETC (2015) Executive Dashboard, Tourism Economics.

3. Reaching out the emerging markets

However, the European tourism industry is facing increasing global competition from emerging destinations that are attracting increasing numbers of tourists. Destinations in Asia and the Pacific will benefit from the expansion of intra-regional travel and will gain most of the new arrivals in 2030. Consequently, North-East Asia will replace

Southern and Mediterranean Europe as the most visited sub-region by 2030. In order to remain the world's first tourist destination, Europe must respond to these shifting patterns in global tourism capitalizing on the potential of tomorrow's outbound travel markets whose expanding middle classes are a growing market for European destinations.

Fig. 3 - International tourist arrivals are forecasted to grow but Europe’s market share will reduce by 10% by 2030



Source: ETC (2015) Executive Dashboard, Tourism Economics.

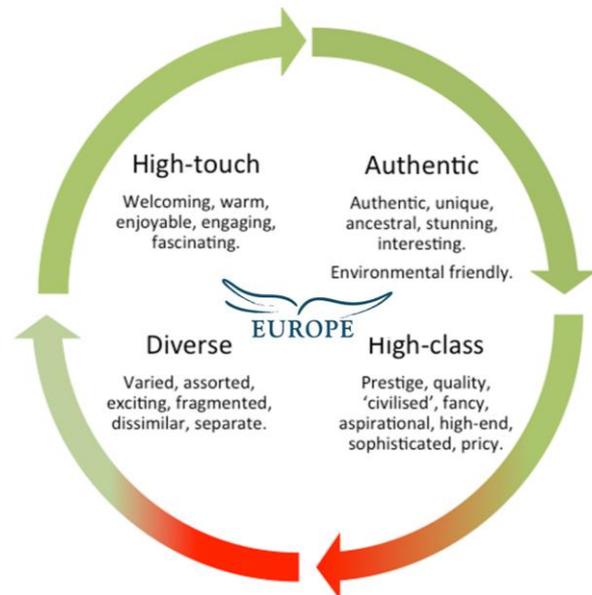
4. Brand Europe vs Joint Promotion

The creation of a “Brand Europe” is a very sophisticated topic and since its concept goes beyond the tourism sector it hasn’t been really explored yet. Further definition, as well as explanation of the association with other industries is crucial before embarking in developing a brand.

In this respect, ETC went recently thru an exhaustive analysis, focusing only on Europe from a tourism point of view, as a tourism destination “per se” and by defining the continent’s unique selling points (USPs) and identity as a tourist destination.

In addition we conducted a large number of

Fig. 4 - Europe’s values and USPs



Source: ETC. European Travel Commission.

on the image of Europe as a tourist destination in major long-haul markets¹ and did an in-depth analysis of main competitors (Brand USA, Visit Australia, etc.).

Our first conclusions were that due to the current structure of Tourism in Europe (DMOs), we should primarily seek for a joint promotion strategy rather than a brand, with the main aim of creating an effective umbrella for all ETC NTO members while at the same time conveying their countries' distinctive and individual characteristics.

We called this strategy "Destination Europe".

5. Destination Europe

Thanks to the long-time cooperation with European Commission, ETC received funds in 2012-2013-2014 for this project, which is continued in 2015 under a new grant. The promotion of "Destination Europe" is part of a strategy to optimize Europe's market positioning in long-haul-markets.

The Destination Europe strategy is based in three pillars:

~ (1) Promoting values and USPs of Europe as destination

By defining the continent's values and Unique Selling Points, "Destination Europe" is intended to create an effective umbrella for all European countries while at the same time conveying their countries' distinctive and individual characteristics.

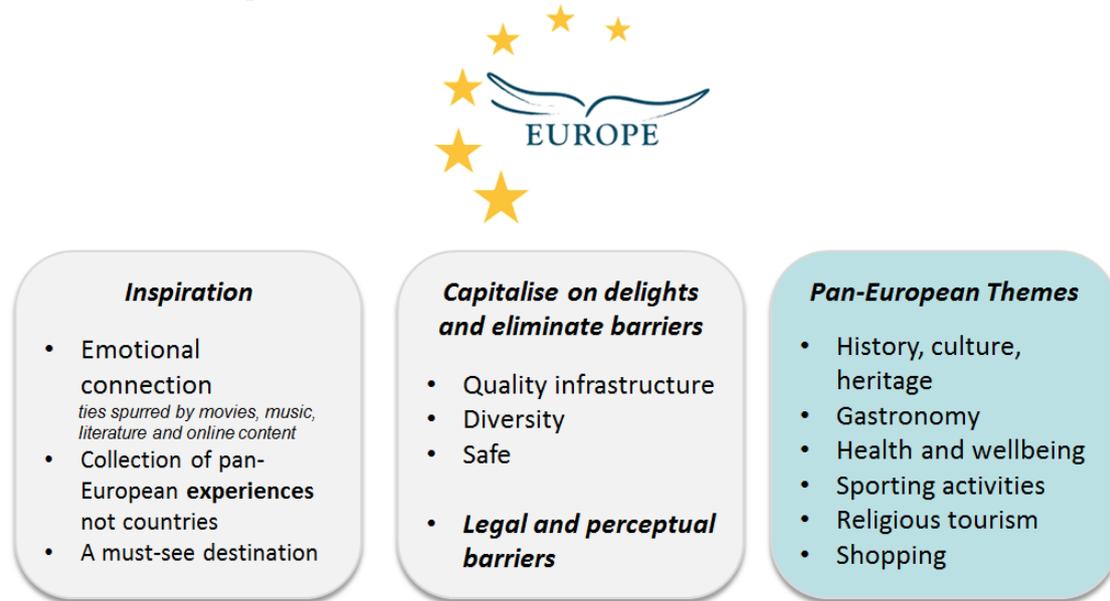
It is also intended as a tool to promote loyalty to Europe among tourists and the travel trade.

~ (2) Raising awareness and satisfaction among long-haul travellers

Based on the extensive market research gathered by ETC and partners, we learned that potential visitors to Europe seek inspiration and are drawn to Europe as a destination by the amount of experiences they can have rather than the number of countries they can visit. One of the main achievements of the Destination Europe initiative was the identification of visitors' perception of Europe in four key markets (Brazil, China, Canada and USA) and what this entails in terms of future promotion/marketing activities to offer a better experience to visitors. However, while Europe

¹ The ETC has conducted studies on the brand Europe in Brazil, China, India, Japan, the Middle East, Russia and the USA.

Fig. 5 - Destination Europe



Source: ETC. European Travel Commission.

is also admired for its quality infrastructure and safety, legal (especially visa requirements) and perceptual barriers inhibit tourism flows. This is particularly significant. In order to remain competitive and foster sustainable growth, Europe must tackle these challenges and leverage delights.

~ **(3) Promoting Destination Europe with a Pan- European approach**

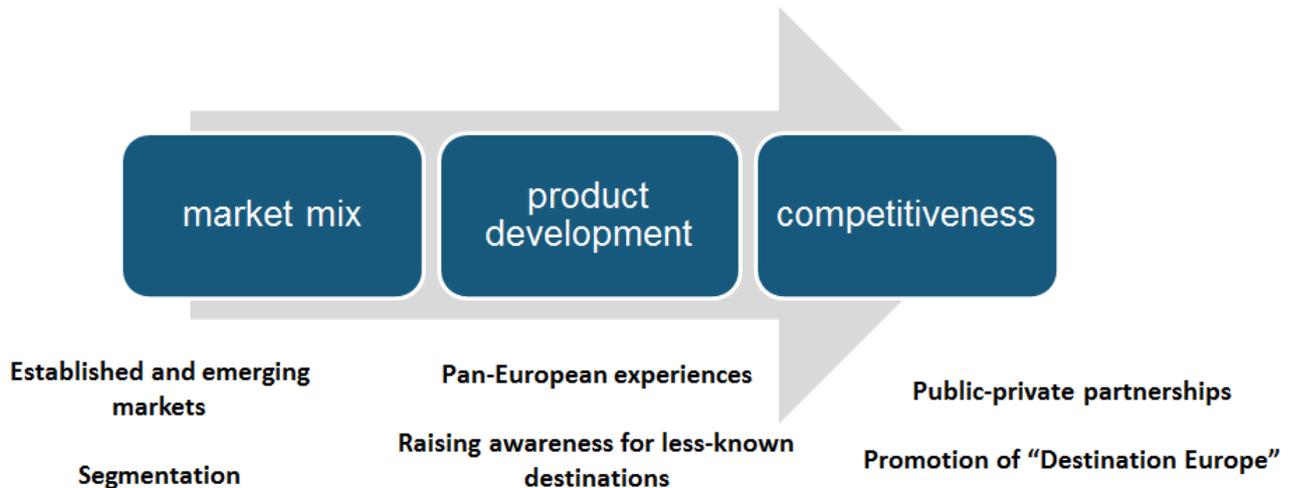
In the long-term our strategy will focus on raising awareness of Destination Europe thru

joint promotion and cooperative marketing activities based on pan-European, transnational thematic products and experiences. These shall inspire and be tailored to different markets and traveller segments.

Pan-European experiences that stand out in this context are products such as cultural routes, heritage, gastronomy, shopping tourism, active tourism (biking & hiking), adventure tourism, health and wellbeing tourism, education, sailing & cruising, religious tourism, etc.

Fig. 6 - Destination Europe: promoting with a Pan-European approach

Foster Europe's USPs through pan-European product development



Source: ETC. European Travel Commission.

The European Travel Commission currently works together with the European Commission consolidating joint promotion activities for all European National Tourism Organisations adding value to their own marketing efforts in order to project a clear and instantly recognizable message to the travel industry and end consumers.

In the current year the core of "Destination Europe" is the stimulation of competitiveness and the promotion of sustainable growth of the European tourism sector by raising awareness

for 'Destination Europe' in long-haul markets mainly thru our recently revamped VisitEurope.com portal. In particular, through the promotion of pan-European thematic and transnational experiences on the portal.

6. Conclusions

To summarize what I have outlined before, ETC firmly believes that the most important things to successfully promote 'Destination Europe' and to support the sustainable growth of the European tourism sector are:

- 1) It is crucial that tourism organizations at all levels continue to strengthen their collaborations under the umbrella of a common European approach and positioning rather than thru a brand. Destination Europe provides an inclusive holistic approach creating advantages for both established and less known destinations without creating confusion or further competition. A clear definition and the potential of a joint promotion strategy for Europe has to be further developed, where the fully integration of all tourism key players has to be essential adding value to all current promotion efforts.
- 2) Through intensive market research, the public sector should continue uncovering the themes fostering the development of pan-European experiences and products and stimulate the dialogue with the industry to develop the products.
- 3) Deep cooperation between public and private stakeholders at continental, national, regional and local levels.
- 4) The establishment of a reputation for specialized products that appeal to and fulfil the needs of different traveller segments.
- 5) Eliminate travel barriers for overseas markets (visas, taxation, interconnectivity, consumer protection, etc.)
- 6) Last but not least, increase of tourism promotion budgets.

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