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PRESIDENT'S FOREWORD

Dear Members and Friends of the European Travel Commission,

As we reflect on the year 2022, it is clear that the COVID-19 pandemic had an unprecedented impact on every aspect of our lives and work, including in the travel and tourism sector. The pandemic challenged us in unimaginable ways while testing our unity and cohesion.

Despite the inconceivable challenges, European tourism has shown remarkable resilience and has bounced back stronger than ever. The industry has adapted to the new realities brought by difficult times, learning not only to care for tourists and locals but also to find solutions and address complex problems together. This cooperative attitude, inherent to the European tourism ecosystem, allowed many businesses to reopen in record time, warmly welcoming tourists back to their destinations.

The recovery of European tourism is a testament to the strength and resilience of our continent. We have shown that we can come together, work collaboratively and overcome challenges, even in the most difficult circumstances. As we continue to rebuild and recover, we must remain united and continue to support each other.

To heighten an already challenging period, 2022 brought another major crisis on European soil with the Russian invasion of Ukraine. The conflict in Ukraine has caused immense suffering, and we must show solidarity with those affected. As such, I am proud of ETC members for unanimously agreeing to extend a complimentary membership to the State Agency for Tourism Development of Ukraine. Tourism is an instrument of peace, and we stand by Ukraine to help rebuild its travel sector once the situation



allows. As we work towards a brighter future for Europe, we must not forget the importance of holding together and supporting those in need.

In this Annual Report, you will see the incredible efforts made by ETC, its members, and partner organisations to adapt and recover, looking forward to a brighter tomorrow.

Together, we can emerge from future crises stronger, and build a more resilient, sustainable, and inclusive tourism industry for the future.

Yours sincerely,

Luis Anaijo

President of the European Travel Commission

MESSAGE FROM ETC EXECUTIVE DIRECTOR

“ The future depends on what we do in the present. ”

Mahatma Gandhi

In recent years, Europe has faced a number of crises, from the refugee crisis to the COVID-19 pandemic and, lately, the invasion of Ukraine by Russian armed forces, which have challenged its cohesion and unity.

In the face of numerous challenges, the role of tourism and travel has never been more important. This is particularly significant for Europe, where diversity is a strength, but it can also be a source of tension and conflict. Tourism can help bridge cultural differences and promote a sense of shared identity and belonging, which is essential for building cohesive and peaceful societies.

The European tourism ecosystem has been heavily impacted by these crises, which have been causing disruptions to the industry. However, despite all adversities, tourism remains a key driver of economic growth and social development in Europe. It has the potential to play a vital role in promoting peace and fostering prosperity in the years to come.

The work of the European Travel Commission continues demonstrating how tourism can build bridges by sharing best practices, producing valuable insights and analysis, promoting cross-border cooperation, and fostering a sense of shared identity and purpose. All of those are essential for building a more united and peaceful Europe.

We must also address the climate emergency as the top priority in the next decade, promoting intersectoral exchange and dialogue, supporting sustainable development, providing education, and encouraging cooperation between countries and communities.



Tourism has the power to bring people together and promote peace, understanding, and cooperation. I encourage readers of this Annual Report to explore its contents and to join us in promoting tourism as a force for shaping a better future.

I would like to thank wholeheartedly our members and partners for their outstanding support. My team of the Executive Unit deserves special praise for their daily dedication and passion as well as for their ability to adapt to change.

Yours sincerely,

Eduardo Santander

ETC Executive Director

ETC EXECUTIVE UNIT

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

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

The Executive Unit is proud to include staff members and trainees from ten different countries – Belgium, Bulgaria, Denmark, Finland, Italy, the Netherlands, Portugal, Romania, Russia and Spain.



Teodora Marinska
COO/Head of Public Affairs



Miguel Gallego
Head of Marketing and Communication



Jennifer Iduh
Head of Research and Insights



Iulia Niculicã
Head of Administration



Lyublena Dimova
Senior Research Manager



Tatiana Veselova
Corporate Communications and Public Affairs Manager



Anna Bellmàs
Marketing Project Manager



Ludivine Destrée
Marketing Project Manager



Menno van IJssel
Research Project Manager



Diogo Paciência
Digital Marketing Manager



Sophia Westerlund
Administration Manager
(temporary leave)



Roberta Magro Malosso
Administration Manager



Silvia Battiato
Administration Trainee



Matteo Nardin
Digital Marketing Trainee



Sabine Elleswijk
Public Affairs Trainee



Julie Madsen
Research and Development Trainee

¹ Updated to the current structure at the date of publication in May 2023

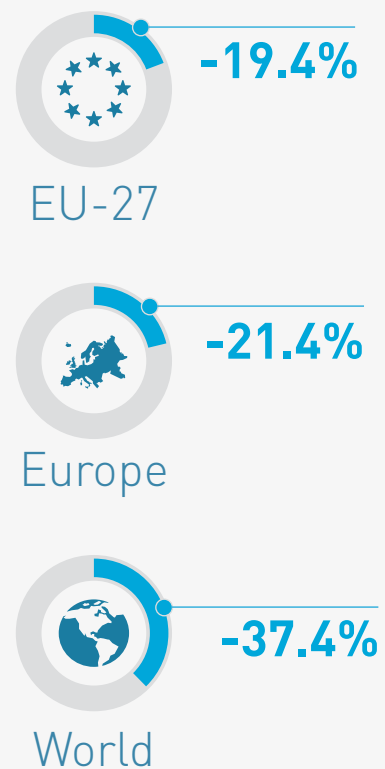
EUROPEAN TOURISM TRENDS & PROSPECTS

PERFORMANCE 2022 & OUTLOOK 2023

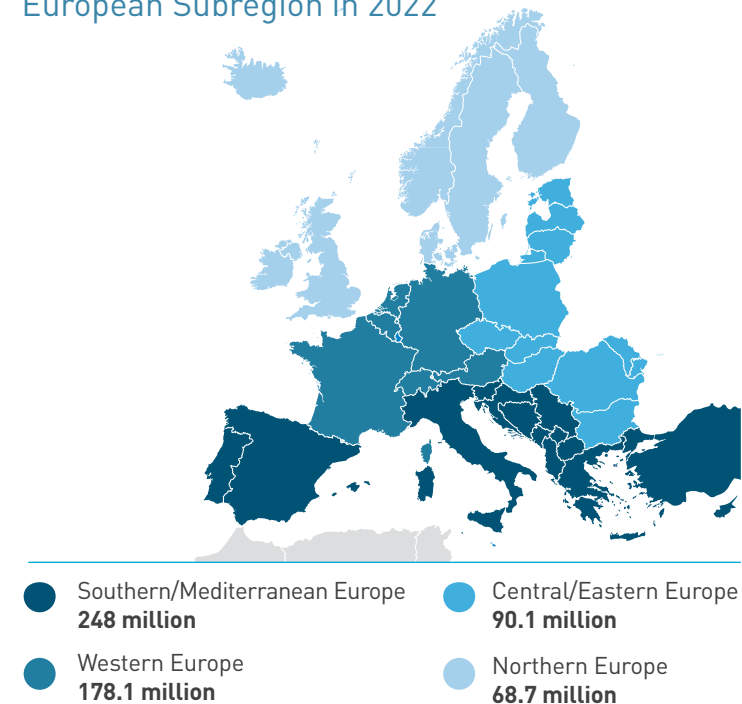
The recovery of the European tourism sector from the COVID-19 pandemic remained resilient in 2022. The travel rebound was supported by a strong pent-up demand following the lifting of COVID-19 travel restrictions globally. However, the region was not exempt from turmoil arising from the ongoing war in Ukraine, the geopolitics-induced energy crisis, labour shortages, strikes, high and persistent inflation, and a looming economic recession. Furthermore, higher prices will continue to impact the tourism sector through elevated jet fuel prices and operating costs for airlines and hospitality establishments. Despite less-favourable conditions, the world's leading tourism destination managed to weather the storm achieving almost 80% of pre-pandemic levels in 2022 (-21% over 2019) as it welcomed 585 million tourist arrivals¹.

Year-to-date data shows that almost one in two reporting destinations have recovered foreign arrivals faster than the regional performance. Stellar performer was Türkiye (-2%) trailed by Serbia (-6%) and Portugal (-7%). Croatia (-11%), Monaco and Montenegro (both 12%) also saw a strong comeback. The heaviest drag to recovery in Eastern Europe continues to be the war in Ukraine and thus the lack of Russian visitors to destinations heavily reliant on this market. Sharpest declines are observed in Finland (-38%), Lithuania, Latvia, and Romania (all -42%)². Recent ETC data on intra-European travel shows that 77% of European travellers plan to take a trip in the first half of 2023, an encouraging 16% increase compared to the same period in 2021³.

International Tourists Arrivals by Region in 2022 (% on 2019)



International Tourist Arrival by European Subregion in 2022



Source: UNWTO World Tourism Barometer, Volume 21, Issue 1

¹ UN World Tourism Organisation (UNWTO)

² European Tourism Trends & Prospects (Q4/2022)

³ [Monitoring Sentiment for Domestic and Intra-European Travel – Wave 14](#)



Long-haul source markets, despite lagging behind short- and medium-haul, saw a boost from the reopening of various borders during 2022. The US continues to lead the recovery of long-haul travel to Europe owing to short-lived and fewer travel restrictions and the strength of the dollar. Based on data for the last quarter of 2022, almost one in four of reporting destinations saw US arrivals exceed 2019 levels. Arrivals from this market to Europe have reached 25% below 2019 levels in 2022 and are expected to recover 82% of 2019 volumes in 2023. However, rising transport prices and recessionary pressures will begin to bite going into 2023, eased mildly by a strong dollar.

Travel demand from Asia/Pacific to Europe is poised to rebound in 2023 as the region broadly reopened over the second half of 2022. Encouraging news came with the announcement of the end of the three-year-old 'zero-COVID' policy in China on 7 December 2022. Experts anticipate a gradual return of Chinese travellers, from the second quarter of 2023. However, significant barriers remain to full Chinese outbound travel recovery in terms of visas, passports, and air connectivity.

The outlook for European tourism remains encouraging, with forecasts estimating a full recovery of pre-pandemic foreign arrivals in 2025, while domestic travel will do so in 2024.

The January 2023 edition of the World Economic Outlook (WEO) projects a 2.9% decrease in global growth in 2023, which is expected to rise 3.1% in 2024.

Tourism as a force for good should therefore strive to be more inclusive and accessible for all, while addressing overtourism and environmental concerns. Attention should also be paid to strengthening the sector's resilience and competitiveness through innovative and more sustainable approaches for the benefit of society and the planet.

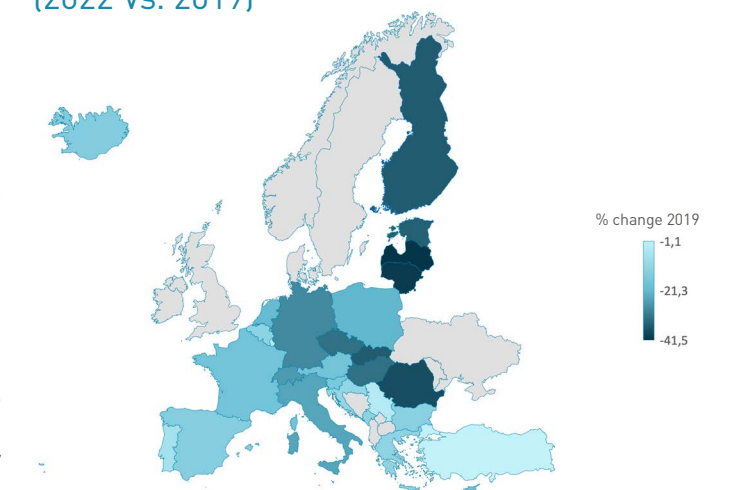
Throughout 2022, the different issues of the European Tourism Trends & Prospects (Quarterly Reports) monitored Europe's tourism recovery and macroeconomic developments. The reports also analysed the ongoing challenges faced by travel and tourism and their impact on the 2023 outlook and beyond.

The reports are complemented by a wide range of industry intelligence and include data from the [TourMIS database](#), [UNWTO](#), [STR](#), [Transparent](#), [IATA](#) and [Eurocontrol](#), with economic analysis and forecasts from [Tourism Economics](#). The publications are supported by a wide range of visually appealing and user-friendly dissemination materials that summarise the report findings, such as webinars, infographics or videos.



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

Foreign Visits to European Destinations (2022 Vs. 2019)



Source: TourMIS

ETC MARKET INTELLIGENCE GROUP

MEMBERSHIP

The Market Intelligence Group (MIG) brings together the Research Directors of ETC's 35 member National Tourism Organisations (NTOs). An essential event in the calendar of the MIG is the group's Annual Meeting, where the aim is to establish the new research programmes for the upcoming year.

7th MARKET INTELLIGENCE GROUP (MIG) AND MARKETING GROUP (MKG) ANNUAL MEETING

The 7th MIG and MKG Annual meeting took place in Switzerland on 2nd–4th February 2022. The meeting gathered Research and Marketing Directors of ETC member countries. Delegates from the [World Tourism Organisation \(UNWTO\)](#), [European Travel Association \(ETOA\)](#), [World Travel & Tourism Council \(WTTC\)](#), [European Tourism Futures Institute](#) and [MINDHAUS](#) were also present. The meeting offered ETC members a chance to learn and exchange knowledge and expertise on the latest trends in research and marketing in tourism.



EVENTS & WEBINAR CALENDAR 2022

- European Tourism Trends & Prospects – January, April, June, and October
- MIC Meetings – April, June, September, and December
- 7th Market Intelligence Group (MIG) and Marketing Group (MKG) Annual Meeting – February
- Impact of the Ukraine War on European Tourism – March
- ETC-Transparent: Vacation Rental Data – May
- The 17th TourMIS Users' Workshop and International Seminar on the Future of Business Travel and Events – September
- ETC-UNWTO DataLab Initiative – May, July, September and November

MIC MEETINGS



ETC's Research Programme is steered by the Market Intelligence Committee, the MIC. The group consists of volunteers from the research departments of 11 of our 35 member NTOs. The MIC gathers four times throughout the course of the year to steer the ongoing projects and studies.



MARKET INTELLIGENCE GROUP

- **Chairperson:** Sérgio Guerreiro (Portugal)
- **Vice-Chairperson:** Nessa Skehan (Ireland); Tania Sultana (Malta)



- **Co-ordinators Executive Unit:** Jennifer Iduh; Lyublena Dimova; James Arnold; Menno van IJssel

MARKET INTELLIGENCE COMMITTEE IN 2022

- Mia Lammens (Belgium, Flanders)
- Steven Valcke (Belgium, Flanders)
- Saša Popovac (Croatia)
- Charlotte Rømer Rassing (Denmark)
- Piret Kallas (Estonia)
- Bert Reila (Estonia)
- Elisabeth Ebon Niinepuu (Estonia)
- Matthias Hickl (Germany)
- Nessa Skehan (Ireland)
- Tania Sultana (Malta)
- Marieke Politiek (Netherlands)
- Patrícia Seguro (Portugal)
- Sérgio Guerreiro (Portugal)
- Ana Špik (Slovenia)
- Barbara Zmrzlikar (Slovenia)
- Julio López Astor (Spain)

PARTNERS

- ETOA – Tim Fairhurst
- UNWTO – Michel Julian

ETC RESEARCH ACTIVITIES

SENTIMENT FOR INTRA-EUROPEAN TRAVEL REMAINED RESILIENT IN 2022

In 2022, ETC continued monitoring Europeans' travel sentiment. This initiative included four reports with insights from residents in Austria, Belgium, France, Germany, Italy, the Netherlands, Poland, Spain, Switzerland, and the United Kingdom.

In early 2022, the Omicron outbreak negatively impacted Europeans' travel confidence. The newly introduced restrictions and requirements hampered Europeans' readiness to travel and left many unsure about the timing of their next trip. Nonetheless, over half (61%) of respondents were optimistic about travelling between January and June 2022, demonstrating resilience.

Later in spring, the desire for travel remained strong, despite the uncertainty caused by the Russian invasion of Ukraine and the ongoing threat of COVID-19. Three in four Europeans

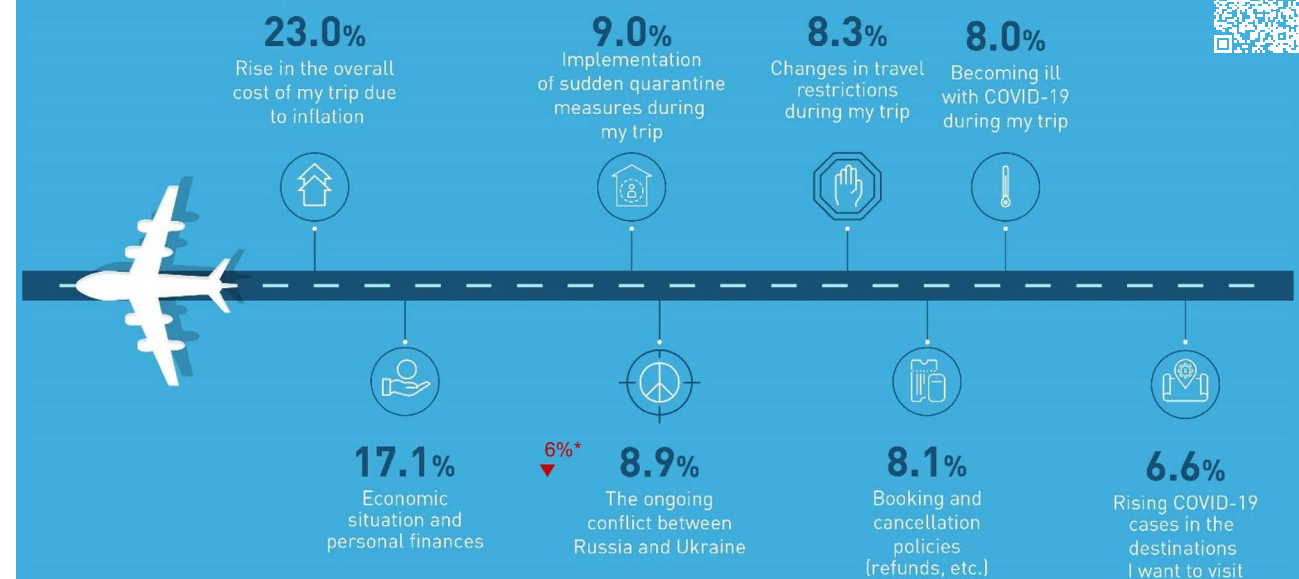
intended to take a trip between April and September 2023, with over half (56%) having an international destination in mind.

As summer approached, Europeans' travel sentiments continued growing, with 73% of respondents planning to holiday between June and November 2022. However, it was notable that although the effect of the Russia-Ukraine conflict was limited, it impacted travellers' confidence with 31% changing their trips in response to the conflict. In addition, inflation and rising travel costs have become the key concerns among holidaymakers.

Sentiment for intra-European travel remained strong in the autumn and winter of 2022, but concerns about the surging travel costs rose. The possible increase in travel fees worried a quarter of European travellers, and 17% were concerned about their finances. Intention to travel was notably lower among Gen Z travellers compared to all other age groups.

EUROPEAN TRAVELLERS' CONCERNS

Travel price inflation and the economic situation are worrying Europeans the most



TRAVEL SENTIMENT IN OVERSEAS MARKETS IMPROVED marginally IN 2022

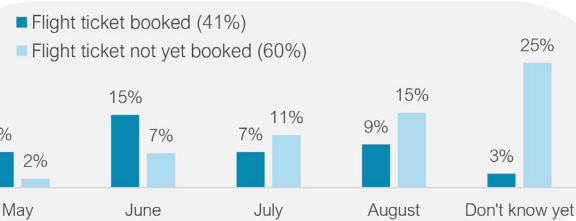
Long-haul travel was a key growth driver for the European tourism sector before the COVID-19 pandemic but has been severely impacted since then. In 2022, the global vaccine rollouts helped Europe regain some of its prior prominences regarding the importance of long-haul travel, though a full recovery will require some time.

To support the European industry in 2022, ETC released three issues of its Long-Haul Travel Barometer (LHTB), measuring short-term travel intentions in seven markets: Australia, Brazil, Canada, China, Japan, the US, and Russia⁴. The barometers provided insights on the impact of current events (e.g. Russia's war in Ukraine, rising inflation, etc.), on travel plans and shed light on respondents' motivations and preferences.

Despite the improved sentiment for overseas trips in the first four months of 2022, the sanitary situation and uncertainty weighed on travel intentions. Yet, stability or slight increases in sentiment were visible across most markets compared to January to April 2021.

The Russo-Ukrainian conflict created new challenges for the European travel sector. However, the LHTB 2/2022 showed a limited impact of the conflict on travel sentiment among all surveyed markets, except for China and Russia. Results showed that COVID-19, travel-related costs and the lack of convenient travel connections were the main deterrents to long-haul travel in May to August 2022.

Intended month of travel and booking status



Following the summer season, the overall appetite for overseas travel in September to December 2022 improved in Brazil, Canada, and the US. Yet, the desire to visit Europe had stagnated with only marginal improvements. With the cost-of-living crisis, personal finances had become the main reason respondents decided not to travel long-haul.

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

⁴ The Australian market was added to the survey in autumn 2022.

TRACKING EUROPE'S ONLINE REPUTATION IN KEY LONG-HAUL MARKETS

In today's digital age, people heavily rely on the internet and social media to decide where to travel, stay, dine, or engage in travel activities. Tracking Europe's E-reputation is thus important as it provides valuable insights into the region's online perception in relevant travel markets.

In 2022, ETC published three reports tracking Europe's E-reputation in seven overseas markets: Australia, Brazil, Canada, China, Japan, Russia, and the US. A thorough analysis of internet conversations, articles and posts regarding travel to Europe was conducted in each market to show how external factors and tourism-centric topics have impacted the region's reputation. The reports also monitored the number of conversations referring to COVID-19 and the war in Ukraine.

In 2022, events such as the Russian invasion of Ukraine, the monkeypox outbreak, inflation, and the labour shortages contributed to a decline in Europe's positive image.

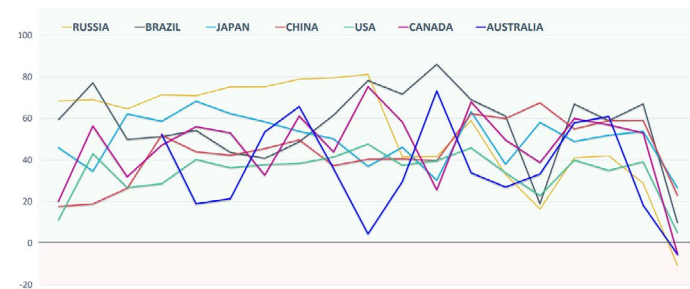
Nevertheless, many positive drivers were captured in consumers' social sentiment, demonstrating Europe's strong touristic appeal. Among those were the well-developed rail network in European countries, the presence of sustainability options through different travel verticals and the diversity of traditions and celebrations across Europe.

This project is co-funded by the European Union.



NET SENTIMENT INDEX

The Net Sentiment Index measures the polarity of social web conversations (% positive - % negative)



STUDY ON CONSUMER TRAVEL ATTITUDES AND EXPECTATIONS

For destinations to be well prepared in an evolving tourism environment, it has become fundamental to identify trends and behavioural changes related to travel in a timely manner. Such an analysis will support destinations in strategic tourism decision-making and planning to build a more resilient and sustainable tourism ecosystem for the benefit of all.

To this end, ETC published a study on Consumer Travel Attitudes and Expectations. This two-phased study is aimed at increasing knowledge on consumer behavioural trends considering major shifts within the industry. The reports support destinations in better understanding travel experiences and long-term expectations. The first phase of the study looked at consumers' behaviour prior to the summer in 2022. The second phase analysed travel experiences and challenges in the summer of 2022 (e.g. COVID-19 pandemic, inflation, and the Russia-Ukraine conflict) and travel expectations for 2023 and beyond.



Check out our [infographic](#) for a summary of the findings of this study!



Check out our [video](#).

Behaviour during the summer

- Cheaper and fewer restaurant visits
- Paying more attention to destination's price level
- Choosing accommodation options with cooking facilities



Summer holidays of 2022

Impact of Inflation on travel behaviour

Future behaviour



Behavioural changes at home

- Put more money aside for travelling
- Change daily habits
- Do thorough research before booking a holiday



Behavioural changes during travel

- Reduce the trip's length
- Travel in the low season
- Choose a more affordable destination
- Decrease spending at the destination



PERFORMANCE OF EUROPEAN TOURISM BEFORE, DURING AND AFTER THE PANDEMIC

ETC published a study that maps the performance of European tourism over the past decade. The report summarises pre-pandemic trends in European tourism, travel and tourism during the COVID-19 pandemic, and future expectations.

In addition, key growth and development opportunities for European tourism were identified in this report. The analysis highlights areas public policies should focus on: stimulating demand from domestic and intra-European markets, accelerating the sector's environmental transition, supporting the restart of the most impacted areas (urban tourism, long-haul travel), planning for enhanced spatial distribution, developing all-year-round tourism experiences and supporting tourism businesses in adapting to the changing reality.

The report published in partnership with [Atout France](#).



SUSTAINABILITY

MAPPING VISITORS' EXPERIENCES IN EUROPE DURING COVID-19

While travel demand remained challenging to anticipate between 2020 and 2022, and destinations offered limited choices for consumers, the importance of monitoring visitor experiences and satisfaction grew further.

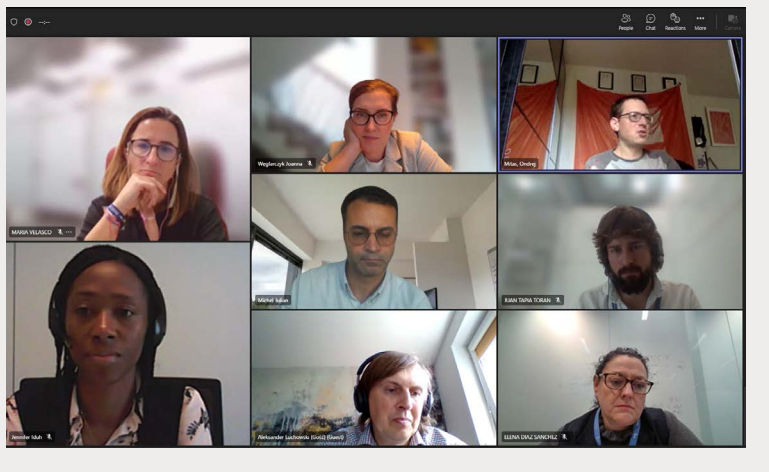

In 2021, travellers restarted sharing feedback on social platforms with peers, shaping the reputation of the places they visited. To leverage this information and support NTOs in informed decision-making, ETC and TCI Research published two reports that assessed the quality of visitor experiences in Europe. The reports mapped the drivers of visitor expectations and European destinations' ability to respond to them in the context of tourism resumption. Results covered two travel periods: November 2020 to October 2021 and October 2021 to September 2022.

The analysis considers domestic and international ratings and reviews from over 25 online sources – in 34 European countries. Data tracks the sentiment related to each country's top 200 most visited hotels and iconic attractions. In total, over 6,000 properties and attractions were tracked, generating about 5 million reviews annually from domestic and international visitors.

The report is published in partnership with [TCI Research](#) and is available to ETC members only.

FOSTERING KNOWLEDGE SHARING THROUGH THE UNWTO-ETC DATALAB INITIATIVE

It is widely recognised that knowledge sharing in tourism is a pivotal resource for creating innovation, advancing knowledge, mitigating risks and positively transforming the sector. To this end, ETC and its long-standing partner, the World Tourism Organization (UNWTO), have joined forces to create a community for knowledge sharing to enhance market intelligence. This initiative, which comprises a network of 31 European NTOs and NTAs, was officially launched in May 2022 and is built under three main principles: knowledge sharing, capacity building and working with data providers. Through a series of webinars, the latest working sessions have focused on tourism dashboards, tourism expenditure data and mobile positioning data.



EXPLORING SUSTAINABLE TOURISM ATTITUDES AND THE VALUE-ACTION GAP AMONGST TRAVELLERS

As tourism recovers from the COVID-19 pandemic, an important goal is to build back better in a more sustainable, innovative, and resilient way. To this end, ETC, with the contribution of the Centre of Expertise in Leisure, Tourism and Hospitality, Breda University of Applied Sciences and the European Tourism Futures Institute, produced a study on sustainable tourism attitudes.

Travellers seem to be paying closer attention to their impact on the environment and local communities. However, the expressed willingness to a more sustainable travel behaviour does not always materialise. It has therefore become imperative to better understand the gap between people's sustainable values and their related actions, and to explore approaches to minimise this discrepancy.

Looking at this 'value-action gap', four distinct clusters of travellers were identified: the Frontrunners, the Comfortable Crowd, the Entitled Stewards, and the Laggards. The study examined how each cluster should be addressed to support the transition towards a more sustainable tourism ecosystem.



ESTABLISHING A COMMON FRAMEWORK OF SUSTAINABLE TOURISM INDICATORS

Recognising the major impact that tourism has on a destination's economic, natural and social environment, ETC set out to establish and define a common framework of indicators for measuring sustainable tourism. Such a framework allows for effective monitoring and measurement, and serves as a foundation for destination management.

In 2022, the third wave of the project on 'Measuring Sustainable Tourism Indicators' was completed with 29 out of 34 European countries participating. Data was collected at a national, regional, coastal, and city level, looking at more than 25 metrics.

The result – available to ETC members only – is an extensive database for destination managers to consult, allowing them to benchmark themselves against each other and identify best practices towards the development of sustainable destinations.

USING SATELLITES TO MEASURE TOURISM'S ENVIRONMENTAL IMPACT

ETC commissioned this pilot project with the aim to understand the evolution of the environmental context in which tourism activity occurs across selected European cities and destinations. Using the approach of remote-sensing satellite data, the impact of tourism on air quality was measured, as well as the relationship between urbanisation patterns and tourism development.

The project found that during the COVID-19 pandemic a significant improvement in air quality could be observed in cities where tourism constitutes an important part of economic activity. Additional factors that influence air quality include seasonality and effective policy changes. Looking at urbanisation patterns, the development of tourism infrastructure was found to be in line with overall urbanisation trends.



MAPPING SUSTAINABLE TOURISM CERTIFICATION SCHEMES

Sustainable tourism certification schemes are an important factor in monitoring and fostering sustainability throughout the tourism value chain. ETC investigated third-party sustainability schemes in Norway, Slovenia, Finland, and Switzerland in order to understand how such schemes are applied at a national level in tourism. This could help other members to select the appropriate schemes for their destinations.

Results revealed that there is no 'one size fits all' approach when it comes to certification. Destinations choose the number and type of certifications to fit the circumstances in their country, the type of scheme they want and the level of resources available to administer it.

DISSEMINATION

The adequate dissemination of ETC's market intelligence remains a priority of the organisation. Research insights have been transformed into infographics and QuickTake videos to provide easily digestible insights for European NTOs and the wider sector. Furthermore, ETC maintains two comprehensive dashboards designed to disseminate vital statistics on European tourism. The ETC Executive Dashboard empowers member countries to access essential data on accommodation performance, travel sentiment, perceptions of European destinations, etc.



The ETC & Tourism Economics dashboard, launched in 2022, is available to the public and provides data on European destinations' performance, tourism flows within Europe, as well as trends in tourism spending, travel purpose, and transportation mode.



COLLABORATION WITH RESEARCH PARTNERS

In 2022, ETC hosted a series of webinars together with its research partners aimed at helping NTOs and DMOs navigate tourism challenges and build back better in post-pandemic times.

Impact of the Ukraine War on European Tourism

ETC was joined by its partners [Tourism Economics](#), [TCI Research](#) and [ForwardKeys](#) to assess the major economic impacts and effects on total travel demand, flight booking trends and Europe's online reputation.



ETC & Transparent Webinar

In this webinar, hosted by ETC and [Transparent](#), insights on vacation rental data was the focus: how to enable stakeholders to make smarter decisions based on short-term rental industry data and ultimately maximise revenue. Destinations require such data for the monitoring, forecasting and benchmarking of their performance as a tool in post-pandemic times and to ensure sustainability.

MARKETING GROUP

Chair: Charel Van Dam, The Netherlands

Vice-Chair: Maria Elena Rossi, Italy

Coordinator: Miguel Gallego, ETC Executive Unit



MARKETING GROUP CHAIRMANSHIP

The Marketing Group elected Charel van Dam, Marketing Director at NBTC Netherlands Board of Tourism & Conventions, as its new Chairperson. Together with Vice-Chair Maria Elena Rossi, Global Marketing Director at the Italian National Tourist Board (ENIT), Charel will steer ETC's marketing efforts and work with all members and partners to share knowledge and best practices in the field of destination marketing.

MARKETING ACTIVITIES

CO-BRANDING CAMPAIGNS BY THE JOINT PROMOTION PLATFORM

ETC delivered four pan-European promotional campaigns in partnership with 18 partners, to leverage resources for the joint promotion of Europe in third markets.

The aim of these co-branding campaigns was to reinforce consumer confidence in travel, build a distinctive image of Europe as a travel destination, and stimulate sustainable demand for travel to and around Europe. These campaigns contributed also to fostering transnational public-private partnerships that would not have been possible without the support of ETC and the European Union.



Co-branding campaign - Thermal Travels: Immerse Yourself in the Spa Culture of Europe

'EUROPE INVITES THE CURIOUS' GLOBAL CAMPAIGN

ETC activated the 'Europe Invites the Curious' campaign in the US and Australian markets to stimulate the 2022 summer season following the lifting of the latest restrictions related to the COVID-19 pandemic in these markets.

The US campaign was conceived as a top-down co-operative campaign which aimed at reinforcing consumer confidence in travel to Europe, despite the ongoing war in Ukraine. The campaign tactics included an integrated data strategy based on a combination of engager data capture as well as leveraging third-party web data from high-performing premium content sites and audience profiles. A similar methodology was used for the rollout of the campaign in Australia, which ETC targeted for the first time in 2022.

Both campaigns combined reached more than 25 million impressions and 5.7 million video views with an average interaction rate of 3.5%. Almost 700,000 flight and hotel searches to Europe on booking websites could be attributed to consumers that were exposed to these campaigns, which were co-funded by the European Union and nine ETC members and partners.



'Europe Invites the Curious' digital campaign

FAM TRIPS

ETC organised 5 familiarisation trips (FAMs) for 30 niche tour operators, travel journalists and influencers from North America and Brazil as well as two European influencers. The objective of these FAMs was to educate and prepare members of the travel trade to better communicate, market and promote travel to new destinations in Europe. At the same time, these trips facilitated building new business relationships between local travel suppliers and buyers, which may translate into new products for Free Independent Travellers (FITs) in the future. Each FAM followed a different pan-European itinerary which was designed in cooperation with NTOs and local DMOs around the themes of History and Ancestry and Creative Cities. These trips were co-funded by the European Union.



Liberation Route Europe FAM Trip

OVERSEAS CHAPTERS

ETC CANADA CHAPTER NEW CHAIRMANSHIP

Sandra Moffatt, Market Manager for Canada at Tourism Ireland, and Marco Frank, Trade & Partnerships Manager at Visit Flanders, were appointed as Chair and Vice-Chair respectively of the ETC Canada Chapter.

Sandra and Marco's commitment to ETC operations in recent years earned them the support of ETC members to lead the promotion of Destination Europe in Canada in the coming years.

FUTURE OF TRAVEL: REBOUND

The Canada Chapter partnered with Travelweek and Profession Voyages to deliver a keynote and destination updates at the 'Future of Travel: 2022 Recovery' and the 'Future of Travel: Rebound' virtual conferences. The events took place in February, April and November, aimed to inspire over thousand English and French-speaking Canadian agents to start booking European destinations again.

CATO TRAVEL TRIVIA MASTERS

ETC was a platinum sponsor at the inaugural Council of Australian Tour Operators Travel Trivia Masters event, aimed at reconnecting the Australian travel trade industry post-pandemic. The event was sold out, with 200 representatives of the Australian travel trade in attendance, including a broad representation of the ETC Australia Chapter. The event was themed with attendees encouraged to dress up to represent their favourite culture or country, to add to the fun and character of the trivia evening.



CATO's Travel Trivia Masters event in Sydney



2022 ETC China Chapter Autumn Reception

ITB CHINA INDUSTRY MEETUP AND VIP RECEPTION

ETC was pleased to team up with ITB China, China's leading B2B travel trade show, to host and sponsor the 'ITB China Industry MeetUp' event series. ETC's presence led a broad range of European destination representatives, including Austria, Croatia, Finland, Ireland, Poland, Portugal, Malta, the Netherlands, Germany, Spain and Switzerland, among others.

ETC also showed a strong presence in China by hosting a VIP reception in Shanghai in September ahead of the ITB China MeetUp event in the city. ETC hosted 100 key members of the Chinese travel trade and media to showcase Europe's support to the Chinese people and willingness to welcome back Chinese travellers as soon as travel between the two continents restarts.

DIGITAL MARKETING

EUROPE COMMUNICATION AWARD IN BRAZIL

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

In 2022, the 32nd edition of the award ceremony included the presence of the Consul General of France in São Paulo, Yves Teyssier d'Orfeuill, and the Chair of the ETC Brazil Chapter and director of Czech Tourism in Latin America, Petr Lutter, as well as the representatives of the NTOs of France, Norway, Portugal, Spain and Switzerland. The award ceremony took place on 2 December at the General Consulate of France in São Paulo, gathering more than 100 media and travel trade professionals. Four journalists and travel bloggers were acknowledged and awarded a trip to Europe.



ETC Brazil Chapter at the ceremony of Europe Communication Award in Sao Paulo

EUROPEAN RECEPTION AT FESTURIS

ETC's Brazil Chapter was present at the 34th edition of FESTURIS in Gramado, where it hosted a reception for luxury travel agents with the aim of supporting and reassuring the Brazilian travel trade's confidence in selling European destinations. The tourism offices in Brazil of the Czech Republic, France, Italy, Germany, Portugal, Spain and Switzerland participated in the event.

TOURISM EXPO JAPAN 2022

ETC participated for the first time with a dedicated Europe pavilion at the trade and consumer show Tourism EXPO Japan. Jointly organised by the Japan Travel and Tourism Association, the Japan Association of Travel Agents (JATA), and the Japan National Tourism Organization (JNTO), the 2022 edition of the event was held at the Tokyo Big Sight from 22 to 25 September. The number of visitors reached 124,000 over the four days, including over 43,000 travel industry professionals and more than 80,000 consumers. The event coincided with the announcement of the lift of the last travel restrictions on foreign travel to Japan.

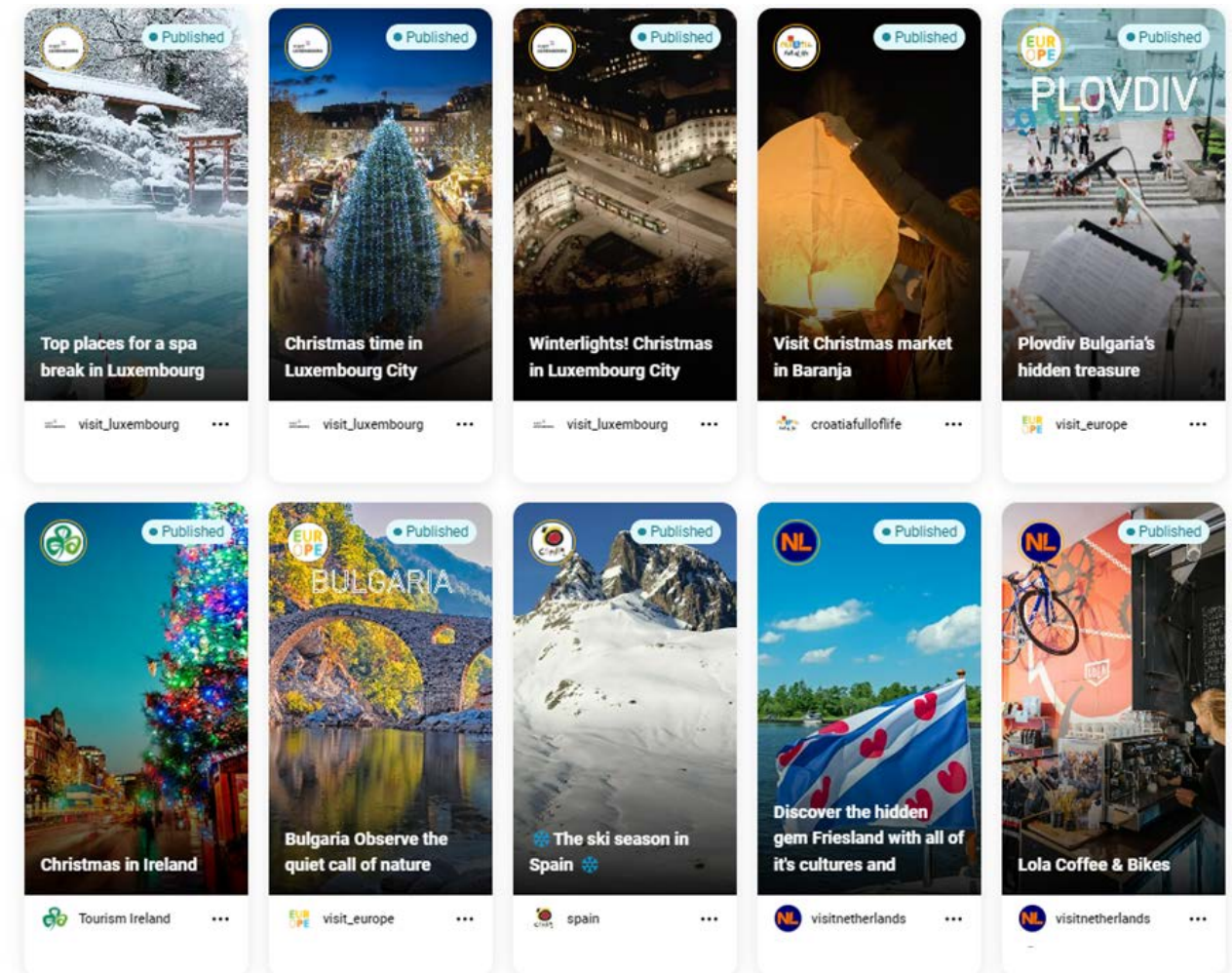
The EUROPE pavilion hosted representatives from the Czech Republic, Finland, France, Germany, Poland, Portugal and Switzerland. In addition to the EUROPE pavilion, Tourism Expo Japan also showed a strong individual presence of other ETC members, such as Croatia, Cyprus, Estonia, Latvia, Lithuania, Iceland, Italy, Malta and Spain.



EUROPE pavilion at Tourism Expo Japan 2022 in Tokyo

EUROPEAN STORIES NETWORK

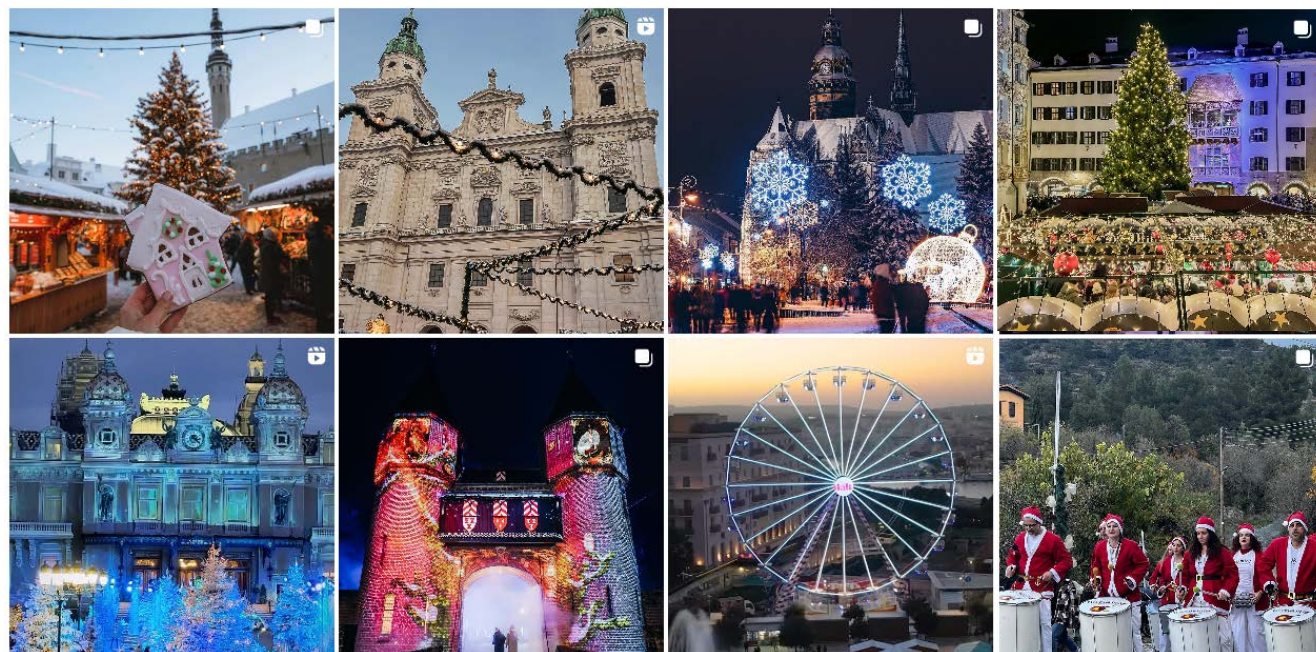
The European Stories Network celebrated its third anniversary and expanded its members to 24 NTOs, which jointly have published more than 300 interactive travel stories. The network is a digital ecosystem of compelling, mobile-first and interactive content that is distributed via galleries embedded on partners' websites and individual AMP stories indexed by Google and displayed in search results. The story galleries reached over 17 million Google impressions and almost 190,687 story views.



INFLUENCER MARKETING

ETC, in cooperation with several NTOs and local partners, hosted four international micro-influencers from Brazil and Japan. These micro-influencers followed different pan-European itineraries showcasing the European Cultural route of the Way of Saint James and some off-the-beaten-path Christmas markets. The content shared on the influencers' owned channels reached almost 482,000 impressions and more than 34,000 interactions.

The content produced by the micro-influencers was repurposed and published on the 'Europe Invites the Curious' campaign landing page on VisitEurope.com and on global social media channels. The content reached almost 243,000 impressions and 20,088 engagements globally.



#CHRISTMASINEUROPE

Christmas in Europe was the backdrop of the User Generated Content campaign that ran on Visit Europe's global social media channels in December. The collaborative digital campaign was possible thanks to the participation of 8 ETC members and more than 120 submissions of pieces of content. It generated more than 620,000 impressions and almost 30,000 engagements across social media.

VISIT EUROPE GUIDES

The Visit Europe Guides (former Visit Europe Magazine) brought monthly travel inspiration to almost 45,000 worldwide subscribers. Throughout the year, 27 countries were featured in the different thematic Visit Europe guides, with an average of 20 destinations per issue.

A new interactive landing page was developed on the [VisitEurope.com](https://www.visit-europe.com) portal to serve as a content hub for each new edition of the Visit Europe Guides and strengthen readership and user engagement. The Visit Europe Guides accumulated more than 500,000 page views. Their content also informed the monthly content calendars on Visit Europe's global social media channels.



PARTNERSHIPS

DESTINATION OF SUSTAINABLE CULTURAL TOURISM AWARDS 2022

The Destination of Sustainable Cultural Tourism Awards increase the visibility of European cultural tourism destinations, build a platform for sharing best practices and knowledge, and promote networking between destinations. In 2022, the theme was 'Relaunching European Tourism through Cultural Heritage & Digitalisation'. The winners were announced during the award ceremony in Krk, Croatia, on 20th October 2022.

The contest was open to tourist destinations across Europe, to showcase their results and contributions to sustainable cultural tourism under seven categories. The Jury, composed of representatives of ECTN, ETC, Europa Nostra, NECSTouR and the European Parliament CULT Committee, selected the winners and runners-up out of over 20 applications received from 13 countries. This edition also received support from the European Association of Archaeologists (EAA), Interpret Europe and the RelnHerit Horizon2020 CSA.

At the event, ETC was represented by its two jury members: Iulia Niculica, ETC Head of Administration and Kristjan Staničič, Managing Director of the Croatian National Tourist Board and Vice-President of ETC. Kristjan Staničič presented the prize for 'Transnational thematic tourism products, including Cultural Routes' category.

The full list of winners can be viewed on the [ETC corporate website](https://www.visit-europe.com).



ECTN, the European Parliament CULT Committee, Europa Nostra, ETC, Interpret Europe, CNTB and EAA

ETC STRENGTHENS ITS COOPERATION WITH NECSTOUR

In 2022, ETC and the Network of European Regions for Competitive and Sustainable Tourism (NECSTouR) agreed to further strengthen their long-term cooperation by signing a Memorandum of Understanding (MoU).

The two organisations agreed to cooperate in selected projects for the sustainable recovery of the tourism sector from the pandemic, to increase synergies in common fields of work and to facilitate the creation of partnerships between NTOs and regions.

Another occasion to consolidate the valuable relationship between ETC and NECSTouR was the Tourism Innovation Summit (TIS), which took place in Seville on 3rd November 2022. The event hosted high-level sessions where ETC and NECSTouR members exchanged views on the short-term and long-term challenges for their destinations, on how to build tourism resilience, and how they are transforming the tourism governance to bring economic and social wellbeing to their communities. On this occasion, ETC members' NTOs from France, Finland, Flanders, Portugal, Slovenia and Spain, as well as Ms Misa Labarile, Policy Officer Tourism, DG GROW, European Commission and Mr István Ujhelyi, MEP, Vice-Chair of TRAN Committee participated in the discussions.



Panel discussion 'Building Tourism Resilience to the geo-political environment' at TIS 2022

ADVOCACY

BEST EUROPEAN RAIL TOURISM CAMPAIGN AWARDS 2022

Following a successful first edition, ETC and Eurail launched the Best European Rail Tourism Campaign Awards for a second year. Similarly to 2021, the awards were focused on marketing campaigns that create synergies between the rail and tourism sectors, and effectively promote train travel as a sustainable tourism model throughout Europe.

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

The awards ceremony took place in Prague on 15th November 2022 during the ETC General Meeting #104. ETC and Eurail honoured the winners and announced that the awards would run again in 2023 after witnessing its growing success over the past two years.

Best in Rail Promotion: **Slovakia Travel**, in partnership with the **Ministry of Transport and Construction of the Slovak Republic and the national railways (ZSSK)**, was honoured for their striking 'So close with summer trains' campaign. To increase the number of Slovaks travelling the region, Slovakia Travel ran a campaign introducing Slovaks to lesser-known destinations across the country. Once the campaign had gained traction, they then revealed how citizens could reach these destinations sustainably, comfortably and quickly by rail. As a result of the campaign, summer 2022 was the most successful summer on record in terms of ticket sales for Slovak trains.

Best in PR: Sweden's **Europarunt.se's** creative agency, **Sweet Creatives**, seized upon a moment of social media to make a splash during an election campaign. When a

Sweden Democrat MP caused a stir with a tweet, in which he posted a picture of a train covered in his party logo with the caption 'Return-migration train. You have a one-way ticket. Next stop Kabul!', Europarunt.se published a similar tweet but with an inclusive message that celebrated rail travel as a way of exploring cultures. The tweet read: 'Welcome to the Europarunt.se train. You hold an Interrail pass. Next stop, cultural exchange, diversity, and peace! For 50 years, Interrail has stood for unlimited travel in 33 countries and promotes openness, freedom, and tolerance.' The tweet quickly went viral and generated valuable engagement for the brand, helping to raise awareness of its service.

Best in Education: **Swiss Travel System** won Best in Education for their training of travel agents, as they have played a core role in Europe's rail revival. Swiss Travel System, the organisation responsible for marketing Switzerland's public transport, seized on this insight by creating 'Excellence Talk' – a publication aimed at increasing awareness of sustainable travel options among travel agents. The publications included an issue dedicated to the Grand Train Tour of Switzerland, and another to the Lucerne-Interlaken Express. Judges were impressed with Swiss Travel System's ability to use storytelling to inspire travel agents to influence travellers to choose rail.

Honourable mention: **VisitWallonia** wowed judges with their five 'Car Free Style' travel books in collaboration with **Hike Up** and **Railtrip.travel**. Each book highlights a different travel route, providing travellers with an impressive itinerary complete with the train lines, maps, accommodation suggestions and a list of nearby tourist attractions. Remarkably, the books can be downloaded for free. Judges were impressed by these ambitious guides that promote slow and sustainable travel choices, while making rail travel more accessible.



Best European Rail Tourism Campaign Awards 2022 ceremony in Prague



CLIMATE ACTION

A survey conducted among ETC members in 2021 showed that addressing the impact of tourism on climate change was one of the top priorities of National Tourism Organisations (NTOs) for the years to come. Suggested areas of intervention included investing in the renovation of tourism destination infrastructure and accelerating the use of sustainable, smart, and multimodal transport, among other measures. As a result of this consultation, ETC members decided that the organisation should step up its climate action.

In May 2022, ETC signed the Glasgow Declaration on Climate Action in Tourism. The Declaration was launched at COP26 in November 2021 to raise the climate ambition of tourism stakeholders and ensure decisive action to support these global commitments. The Declaration offers a coordinated plan for tourism climate action, leading and aligning work on this issue while enhancing the need to accelerate climate action in tourism.

By signing the Declaration, ETC committed to developing and implementing its Climate Action Plan to build a consistent carbon reduction strategy and amplify climate action by playing an active role in supporting its member NTOs to commit to Net Zero.

As a first step on this path, ETC, in cooperation with SUNx Malta, organised an online Climate Friendly Travel Training Course in the summer of 2022. The course gave a broad introduction to the nature and intensifying impacts of the climate crisis, the specific tourism implications and the actions SUNx Malta is developing and curating to help communities and companies become climate resilient and reduce emissions. It also focused on the evolving European green and clean regulatory and operational framework and an overview of Climate Friendly Travel (CFT) – SDG/Paris 1.5 as a support for the fundamental transformation that all of society has to make.



Glasgow Declaration
Climate Action in Tourism



EUROPEAN TRAVEL AND TOURISM STAKEHOLDERS CELEBRATE THE REOPENING OF TRAVEL

The 29th June 2022 was an important date for the European Tourism Manifesto alliance. Representatives of the organisations in the alliance met in person for the first time in over two years to discuss the current situation in the travel and tourism sector as well as ideas for the future. The stakeholders praised ETC's excellent work in leading the group over the past years and agreed to continue tackling issues impacting the whole travel and tourism sector.

Following the internal morning discussions, the supporting organisations had an opportunity to meet with the Vice-President of the European Parliament, Dimitrios Papadimoulis, and share with him the upcoming challenges for the travel and tourism sector.

The meeting was followed by an informal get-together at the European Parliament to celebrate the reopening of travel. The evening reception, hosted by MEP István Ujhelyi, was attended by over 70 participants and gathered important policymakers from the European Commission, including Director at DG GROW Valentina Superti, the Council of the European Union and the Committee of the Regions.



Evening reception at the European Parliament

CORPORATE COMMUNICATIONS

BUILDING A RELIABLE VOICE REPRESENTING THE TOURISM SECTOR IN EUROPE IN TURBULENT TIMES

The year 2022 saw the decline of COVID-19 and the resumption of travel in Europe. With the full reopening of borders and the recovery of tourism, the focus of ETC's media engagement has also shifted, focusing on tourism recovery and the impact of the economic and geopolitical context on European and international desire to travel.

Albeit 2022 has overall shown fewer media interest in travel and tourism, ETC continued to enhance its profile as a reliable voice representing the tourism sector in Europe. In 2022, ETC issued 17 press releases and published 12 articles online to promote the findings of the latest research publications and marketing activities, as well as to support its advocacy messages. ETC's work in 2022 received extensive media coverage worldwide, generating over 1,090 press mentions in various mainstream and trade outlets.

The press release that generated the most coverage in 2022 was the publication of the 'European Tourism Trends & Prospects' report for Q1/2022 in May, with a total of over 200 articles. The numbers from the report were picked up by [Associated Press](#), triggering extensive coverage across international outlets. The second topic was ETC

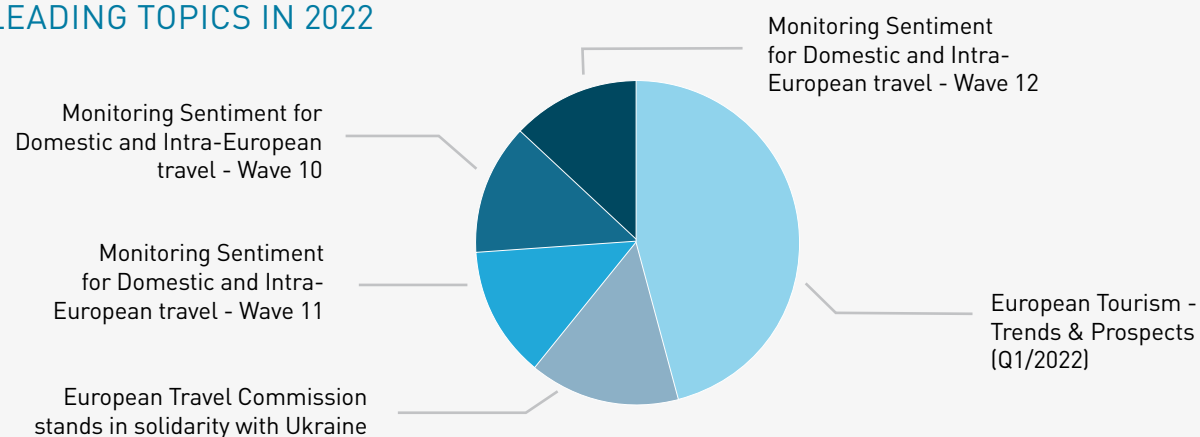
expressing solidarity with Ukraine following the Russian invasion, generating 70 publications. The 'Monitoring Sentiment for Domestic and Intra-European Travel' (Waves 10, 11 and 12) reports also attracted high interest from the media, each gaining over 50 press mentions. Overall, data for 2022 shows that ETC research reports generate the most coverage and interest from the wider public.

ETC also continued to foster relationships with journalists across key mainstream media outlets. In 2022, the media coverage focused on the state of tourism restart, as well as the impact of the Ukraine War and high inflation on the sector. ETC's reliability and professionalism are highlighted by the fact that journalists from top tier outlets such as [Bloomberg](#), [Financial Times](#), [Wall Street Journal](#), [TIME](#) and [Euractiv](#) contacted ETC for data or comments, in some cases more than once, throughout the year.

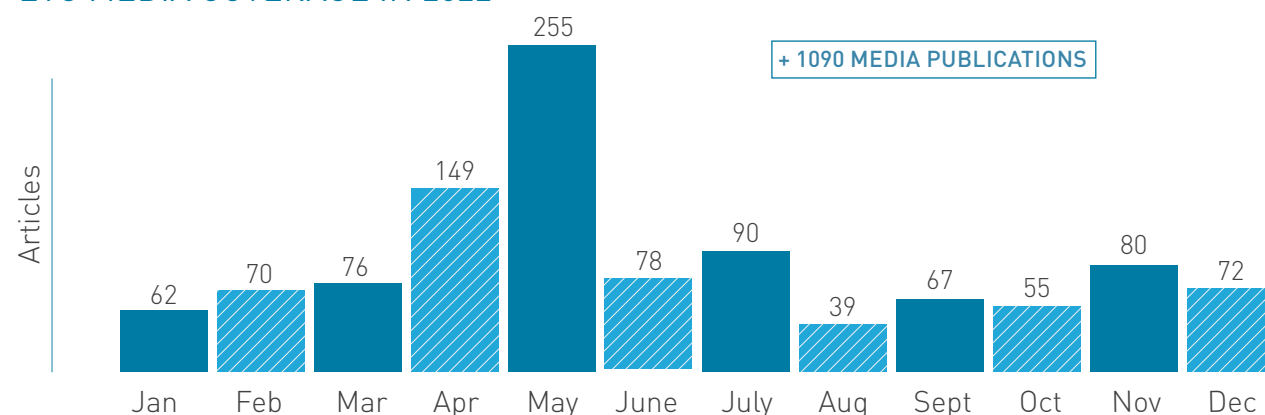
Following the trend of 2020 and 2021, the US is the country with the highest share of articles mentioning ETC in 2022. This can be attributed to the interest that ETC's research studies gauge in US outlets, particularly, the 'European Tourism Trends & Prospects' and the 'Long-Haul Travel Barometer' both brought extensive coverage throughout the year. On the European side, Polish media reacted to ETC news the most, followed by Italy, Spain, UK, Greece, Portugal and Germany.

Heading into 2023, ETC is well-placed to continue providing valuable insights into the travel sector in Europe.

LEADING TOPICS IN 2022



ETC MEDIA COVERAGE IN 2022



TIME

SUBSCRIBE

"The truth is that tourism is rebounding very, very quickly," says Luís Araújo, president of the European Travel Commission (ETC), which represents the continent's national tourism organizations. "It's quite impressive."

ETC President Luís Araújo's comments on European tourism recovery to TIME Magazine, June 2022



FINANCIAL TIMES

myFT

A recent surge in Middle Eastern tourists, as well as [US visitors buoyed by the strong dollar](#), has helped fill stores. Eduardo Santander, CEO of the European Travel Commission, said the lack of Chinese tourists left the many luxury retailers that relied heavily on them with "a huge feeling of loss", but had spurred "a huge effort to diversify".

ETC Executive Director Eduardo Santander's comments on Chinese travel market to Financial Times, August 2022

MEMBERSHIP

UKRAINE'S TOURISM AGENCY JOINS ETC

In a show of support and solidarity, ETC members invited the State Agency for Tourism Development of Ukraine (SATD) to join the organisation with a complimentary membership. The decision was taken during the General Meeting #103 in May in Ljubljana, hosted by the Slovenian Tourist Board.

The membership is offered free of charge for at least three years, depending on the geopolitical circumstances, with a vision to welcome Ukraine to the organisation on a permanent basis. This commitment will see ETC support the Ukrainian tourism agency by providing access to all its resources and research data. It is hoped that through this membership SATD will be better placed to help strategize for the recovery of the Ukrainian travel sector once the war ends.

Mariana Oleskiv, Chairperson of SATD:



The State Agency for Tourism Development of Ukraine is delighted to accept this invitation and join the European Travel Commission. In these horrible times, when our country and industry are under attack, it is heartening to receive such strong support from our partners all across Europe. Ukraine belongs to the European family, and we look forward to working together with ETC. We will restore Ukraine's travel and tourism and make it better together!

ETC's newest member, SATD was in attendance for the first time during the following General Meeting, which took place in Prague in November 2022.



Mariana Oleskiv, Chairperson of SATD at the ETC General Meeting #104 in Prague

EUROPEAN NTOS DISCUSS SOLUTIONS TO BUILD FUTURE TOURISM RESILIENCE

On the occasion of the General Meeting #103 in May 2022, hosted by the Slovenian Tourist Board, ETC organised an Industry Forum on Sustainable Tourism Practices. Although immediate geopolitical risks were front of mind, ETC ensured sustainability was on the agenda and embedding sustainable practices remained a priority for ETC and its member NTOs. The meeting had a record participation, seeing 31 of its 34 members in attendance.

The General Meeting #104 in Prague in November 2022, hosted by CzechTourism, followed a successful summer for tourism in Europe. ETC members discussed how economic uncertainty and cost-of-living are delaying the recovery in travel and the necessity to adapt the tourism offer and promotional activities to address travellers' major concerns. The gathering took place alongside the European Tourism Forum, organised by the Czech Presidency of the Council of the EU.



ETC General Meeting in Ljubljana, Slovenia



ETC family picture at the General Meeting in Prague, Czech Republic

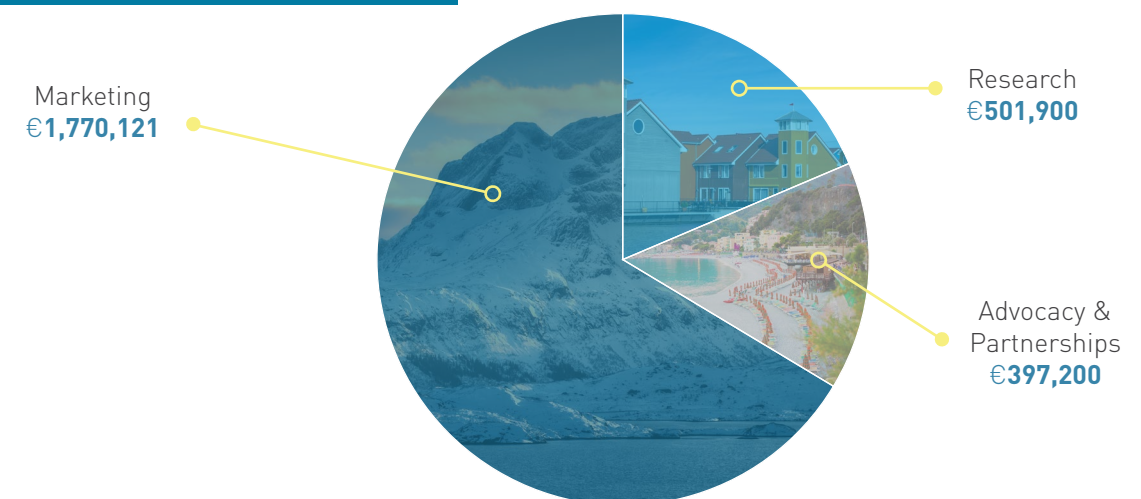
FUNDING

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

In 2022, ETC used a grant from the European Commission focused on the promotion of 'Destination Europe' in line with the priorities for recovering travel and tourism across the continent. Alongside the EU funding, other main sources of income are membership contributions and partners' buy-ins in marketing campaigns in the framework of the Joint Promotion Platform.

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

EXPENSES OVERVIEW



INCOME OVERVIEW



WHO WAS WHO AT ETC IN 2022¹

PRESIDENT



Luis Araújo (Portugal)

VICE-PRESIDENTS



Magda Antonioli (Italy)



Kristjan Staničić (Croatia)



Martin Nydegger (Switzerland)

BOARD OF DIRECTORS



Peter De Wilde (Belgium)



Caroline Leboucher (France)



Petra Hedorfer (Germany)



Miguel Sanz (Spain)



Lisa Weddig (Austria)



Irena Georgieva (Bulgaria)



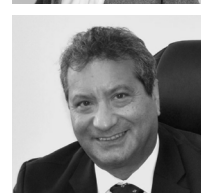
Rainer Aavik (Estonia)



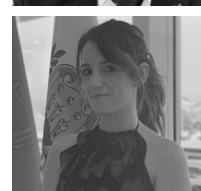
Kristiina Hietasaari (Finland)



Mark Henry (Ireland)

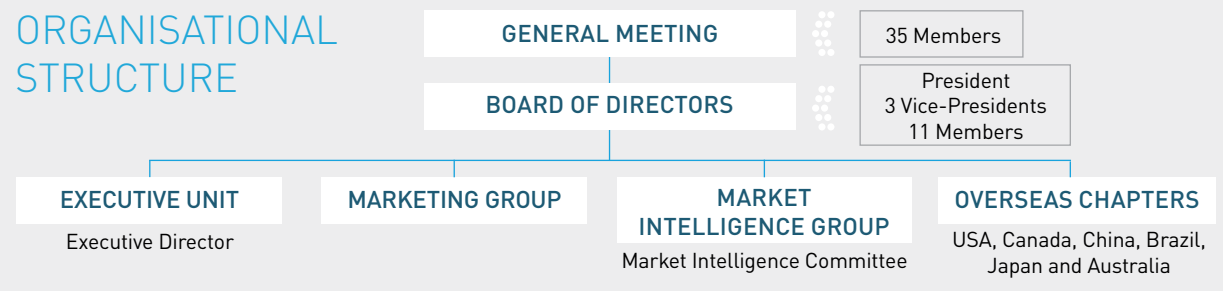


Gavin Gulia (Malta)



Annachiara Sica (San Marino)

ORGANISATIONAL STRUCTURE



¹ Accurate as of end of 2022

FULL MEMBERS

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

ASSOCIATE MEMBERS

