

European Tourism Stakeholders Conference

Madrid, 14-15. April 2010.

Panel 3: Reinforcing the Tourism Image of Europe.

Chaired by: Isabelle Weykmans - Ministerin für Kultur, Medien und Tourismus - Kompetenzen, Belgium.

Rapporteur: Lars Thykier, Managing Director of the Association of Danish Travel Agents and Tour Operators, TSG Member.

Panel:

- Mario De Marco, State Secretary for Tourism, Malta.
- Luis de Grandes, MEP (Spain).
- Dimitrij Piciga, ETC Vice President, CEO Slovenian Tourist Board.
- Jean Claude Baumgarten, President WTTC.
- Irena Guidikova, Head of Division of Cultural Policy, Diversity and Dialogue, Council of Europe.

A. Introduction and objectives:

The discussion paper that was distributed prior to the summit, framed the panel 3 debate as follows:

“**Context:** Europe should be perceived as an attractive destination of choice, both by its own citizens and by travellers from the world’s emerging markets which will be drivers of global tourism growth in the coming years. The interrelationship between competitiveness, quality and sustainability is a key factor, alongside branding overtones, in reinforcing the tourism image of Europe.”

The panel was invited to address the following four Key Questions:

- ü Should emphasis be placed on capturing long-haul market growth or the retention of the intra-European market?
- ü What are the specific needs of emerging third markets that Europe needs to meet?
- ü Could pan-European initiatives or even tourism products that seek to strengthen the European offer, for example branding Europe or creating cultural tourism linkages, reinforce Europe's tourism image?
- ü Does Europe still have a comparative advantage over other continents? In which main aspects of the tourism offer is Europe failing to compete (in quality or price?) and what needs to be done about this?

B. Issues identified:

The panelists addressed the four key questions in their initial presentations, and all five panelists agreed that it is indeed important to try to attract visitors to the European Union from both within the EU and from the outside. They all agreed, that Europe can't afford to focus only on the tourism flows that are already visiting EU-countries, but also must try to attract new business, new tourism from within and from outside EU.

The panelists were all very keen to point out, that product maintenance and development of European destinations is extremely important. Some panelists felt that some destinations are not always aware that they are lagging behind their competition so these panelists underlined that both national as well as EU-tourism development projects must encourage destination- and product development to retain the attractiveness of all EU-countries(regions) as attractive tourism destinations.

Panelists also underlined the need to look at a number of other issues, issues that today limit using the tourism potential of Europe to its fullest extent. These issues were, among others:

- The "Visit Europe" brand is not developed and ready to use. Europe must be branded as a diverse destination with a multitude of products and experiences on offer.
- "Visit Europe" marketing must be developed promoting multiple brands (countries or regions) at the same time, using viral communication and web marketing tools as much as possible.
- A special marketing emphasis should be on efforts that would increase the number of 1st time visitors to the EU (that may then become repeat visitors).
- Visa application procedures, especially those to the Schengen countries, must be simplified and price of visas must be reduced or maybe even removed completely.
- EU-wide, employee service skills must be improved. The current service level of European service industry staff needs to be raised in order to attract and retain visitors from abroad.
- The target groups of the EU "Calypso project" should be brought more into play, and e.g. senior and social tourism products should be developed faster than is foreseen in the Calypso outline.
- The EU Commission should build on the possibilities for tourism development and marketing that are built into the Lisbon treaty and confirm tourism as one of the pillars of growth of the EU-economy.
- The current offer of "specialised European products & routes", such as the European cultural trails, must be expanded and similar products within entertainment and culture should be developed.
- Funding for product development and – revitalization must be available from EU including the structural funds.
- The introduction of EU-wide (CEN-) Standards for the European service industry was suggested – but not discussed - as a way to develop Europe as a common brand.

C. Conclusions and recommendations:

1. EU Tourism – geographical target groups:

Emphasis in future marketing of EU must be on both longhaul markets and the "domestic EU" markets, i.e. a "both/and" strategy. The former being extremely important for the growth of EU tourism in the longer run, the latter being important if nothing else then because it accounts for a huge amount of total tourism turnover in the EU.

2. Market segmentation.

On the long haul markets, emphasis should be on attracting first time travellers to Europe and on the intra-European market, focus should be on developing existing markets probably through both product development and revitalisation of (mature) destinations as needed.

3. Product development.

The existing cross-European cultural routes are a good example of a Pan-European product that will be expanded as a result of demand from customers and suppliers alike. Similar, more focused concepts along the same lines could be developed in other areas, e.g. "summer classical concert routes" or "event routes".

4. Marketing of Europe.

Image of Europe as a "value-for -money" destination must be improved, through (viral) campaigns in order to erase the impression in some markets of a destination that is expensive, with arrogant inhabitants that lack understanding of the overseas visitor.

A focused – long term running – "branding Europe" campaign that emphasises the diversity of the European product (which doesn't single out a region of a country) should be developed and marketed on a recurrent basis both towards EU-citizens and overseas visitors. ETC offices abroad could be used as coordinators of EU-marketing efforts in e.g. The US. An effective way of campaigning at a low cost could be viral campaign tools, using everything from Twitter, over Facebook to dedicated internet campaign sites.

Campaign content suggestions: "Europe is a safe destination", "a very diverse destination with innovative products" and "value for money" – "with a smile."

5. Political actions.

The EU Commissions should strive to simplify visa application procedures, and make (Schengen-)visas cheaper or even free for those tourists that need a visa to enter the EU. Also, multiple-entry & long-validity visas should be considered as a way to encourage "repeat visitors".

Funding of national and/or regional tourism product improvement programmes must be made available and include financial encouragements to those regions that commit to continuous

development of their tourism products and especially those countries/regions that involve all their stakeholders (private and public) as much as possible in tourism development.

Wherever possible, "authorities" should cooperate even closer internally to create the basis for development of high quality tourism products. As an example, tighter cooperation between DG Enterprise and DG Culture in the development of cultural events or other "coherent" Pan-European activities was suggested.

EU- and national politicians must embrace tourism and acknowledge that tourism is "a real (export-) industry" that the future of the EU is built on.

Tourism industry employees must be educated better in order to attract 3rd market visitors. The training should take place on a recurrent basis and must include focused training of customer retention subjects such as intercultural awareness training and service training. Funding should be made available through new or existing EU-programmes/funds.

Lars Thykier

Copenhagen, 26th April 2010.