

# Leveraging the Power of Tourism Data to Build Back Better



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TRAVEL  
COMMISSION**



# ABOUT THE EUROPEAN TRAVEL COMMISSION (ETC)

## OUR MANDATE

Non-profit organisation responsible for the promotion of Europe as a travel destination.

## OUR MISSION

Strengthen the sustainable development of Europe as a tourist destination and 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.

## OUR MEMBERS

35 National Tourism Organisations (NTOs) in Europe

## OUR ASSOCIATE MEMBERS AND PARTNERS

11 Associate Members (private organisations)  
Partners: EC, UNWTO, ETOA, WTTC, etc.



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# ETC RESEARCH

## DATA COLLECTION MARKET INTELLIGENCE

- Tourism indicators
- Economic indicators
- Aviation statistics
- Accommodation statistics
- Short-term rentals
- Online review data
- Travel sentiment
- Consumer behaviour
- Sustainable tourism indicators

## RESEARCH THINK TANK KNOWLEDGE SHARING

- Expert Groups (MIG/MIC)
- Meetings & workshops
- Datalab Network
- ETC studies and reports
- Benchmark analysis
- Data partners (EC, UNWTO, ETOA, Eurail, WTTC, Modul University, etc)

## ANALYSIS & REPORTING DISSEMINATION

- Actionable insights
- Market Insights (Long-haul/European)
- Consumer/Products studies
- Tourism Trends & Prospects
- Tourism Dashboards
- Interactive content
- Infographics



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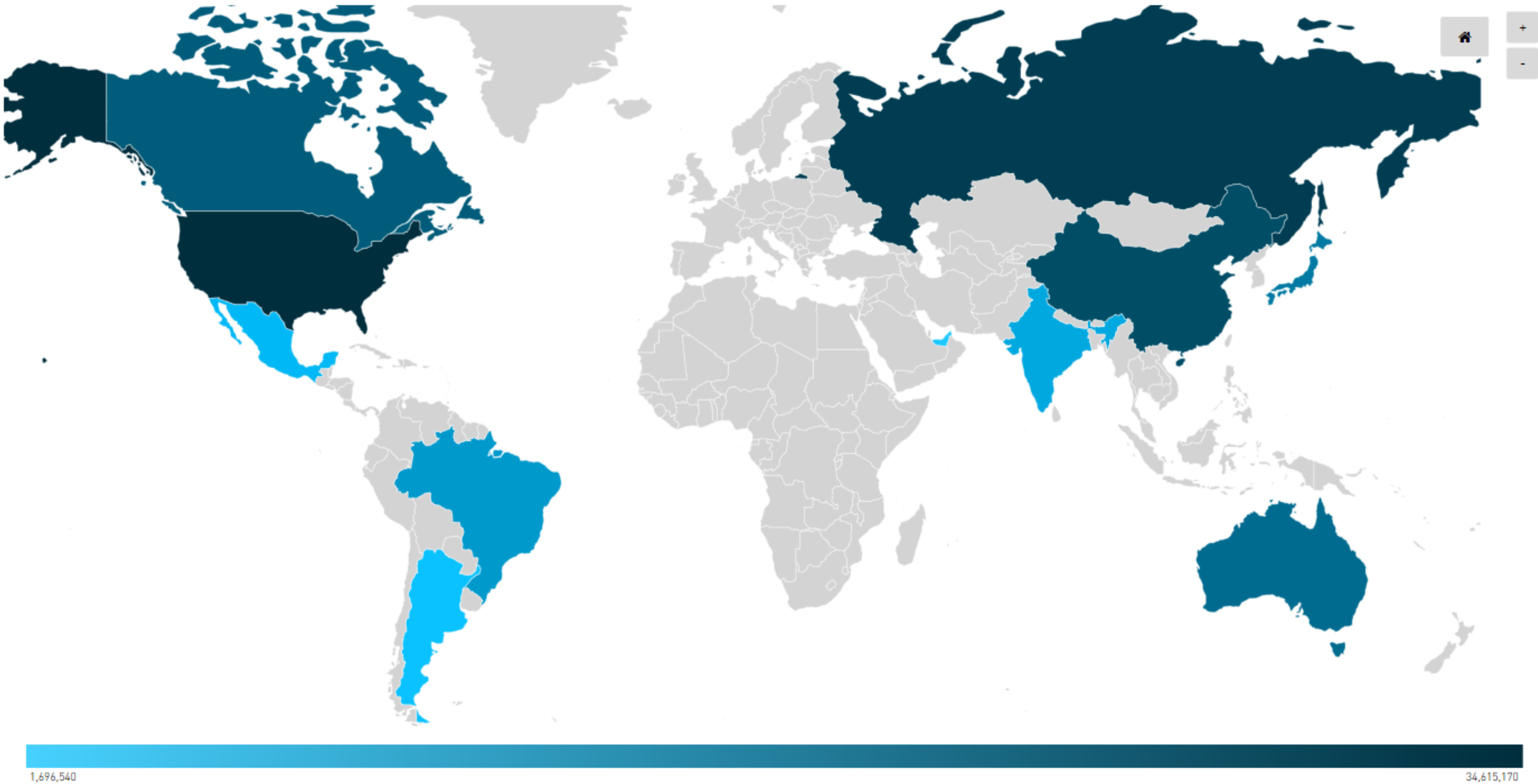
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INTERNATIONAL TOURIST ARRIVALS TO EUROPE BY ORIGIN IN 2018 (ABSOLUTE)

Absolute Growth

United States	34,615,170
Russia	21,697,960
China	15,110,650
Canada	6,413,320
Australia	5,563,450
Japan	4,755,430
Brazil	4,605,790
India	3,731,090
Mexico	1,973,240
Argentina	1,719,810
United Arab Emirates	1,696,540



1,696,540

34,615,170



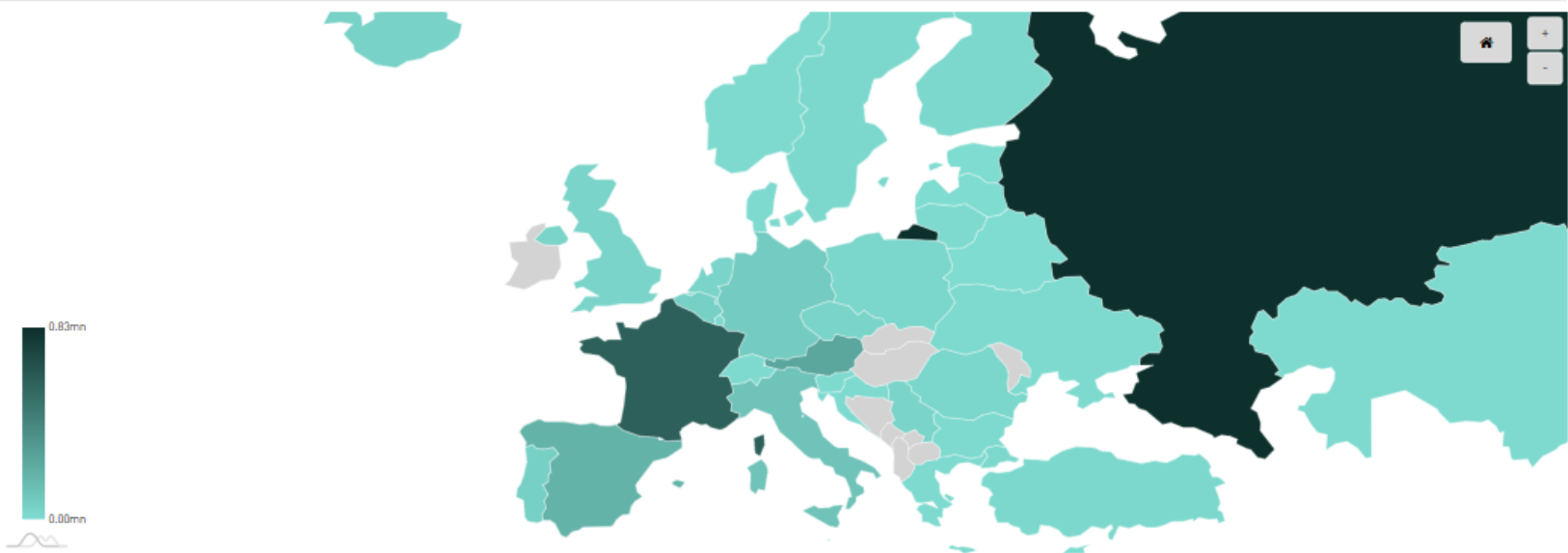


Total Arrivals (World) in 2021  
8,352,500  
-45.39 From previous Year

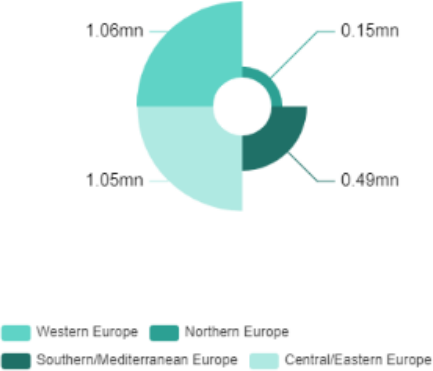
Total arrivals to Europe in 2021  
2,748,210  
-13.76 From previous Year

Growth of arrivals to Europe  
-13.76%  
2022/2021 (forecast)

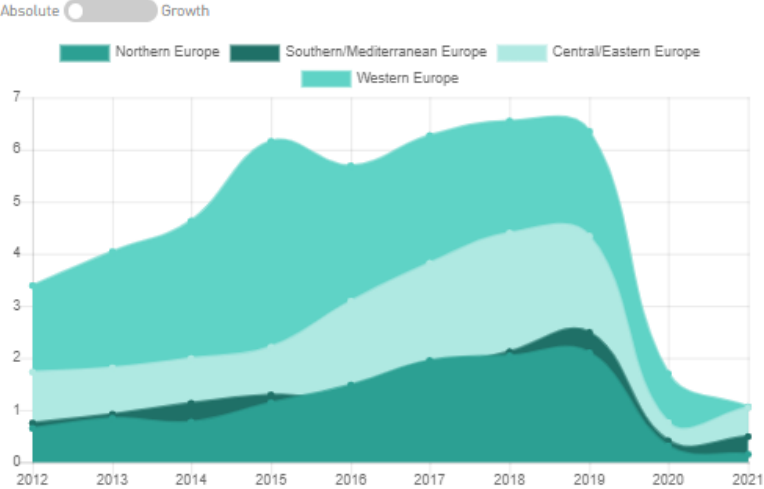
CHINESE TOURIST ARRIVALS TO EUROPEAN DESTINATIONS IN 2021



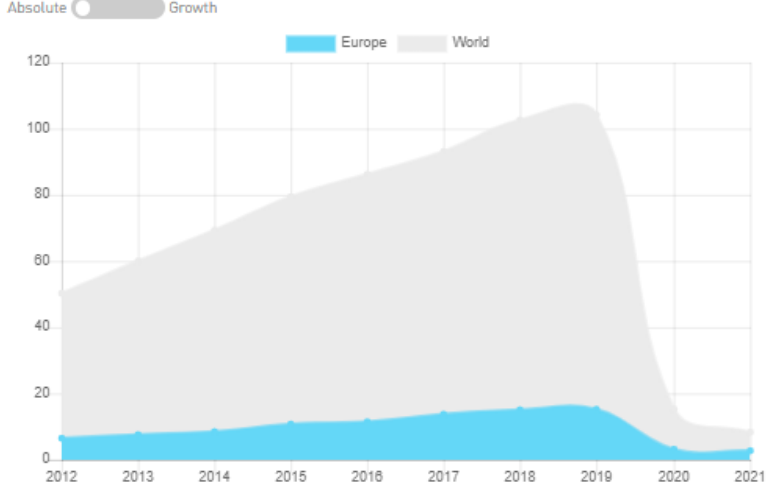
SHARE OF CHINESE ARRIVALS TO EUROPEAN SUBREGIONS IN 2021



CHINESE ARRIVALS TO EUROPEAN SUBREGIONS, TREND (ABS)



TOTAL ARRIVALS FROM CHINA, TREND (ABS)



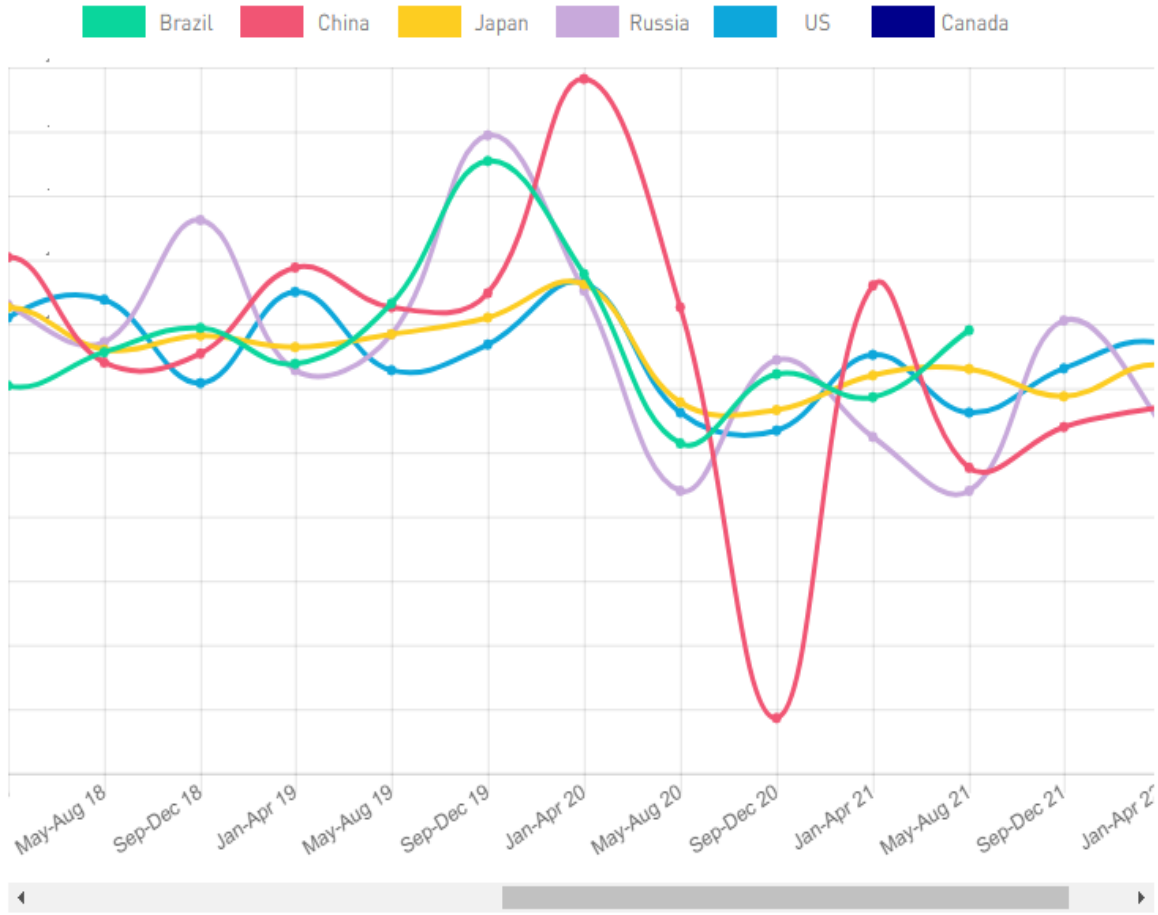
# TRAVEL SENTIMENT

Brazil, China, Japan, Russia, ▾

4 month ☐ Annual ☒

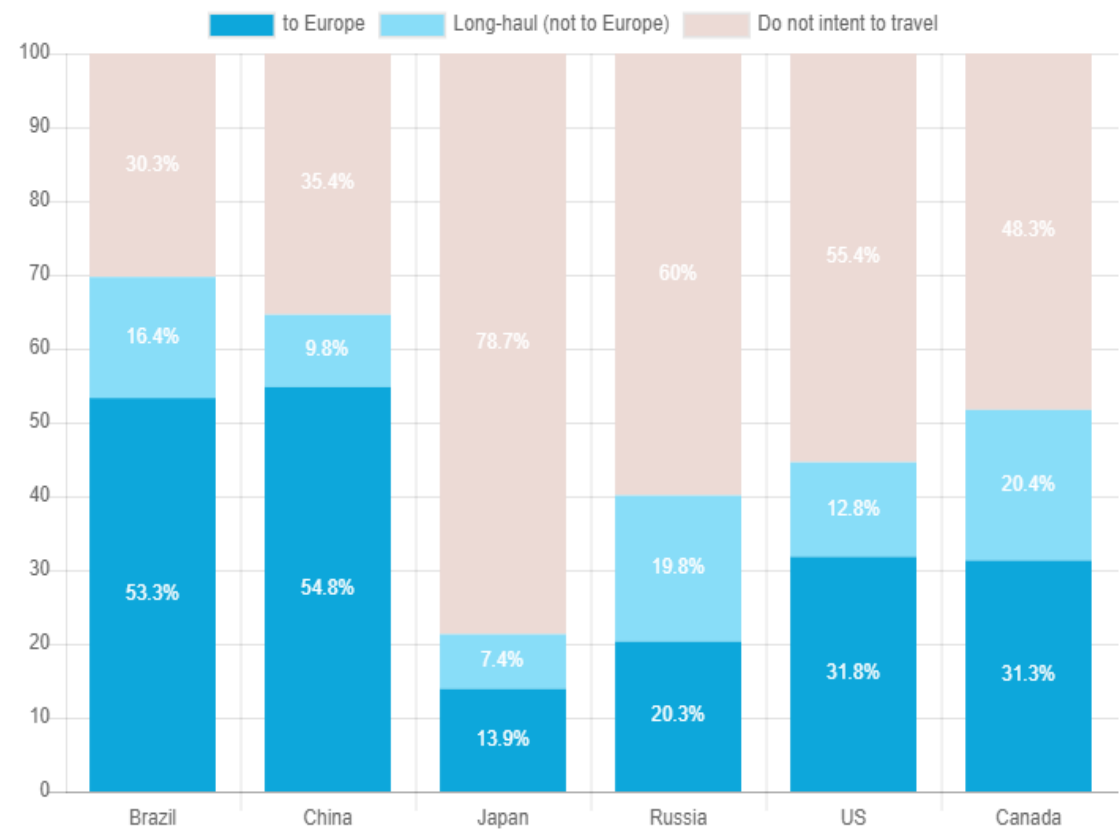
## LONG-HAUL TRAVEL SENTIMENT INDEX (> 100 EXPANSION, < 100 DECLINE)

Europe ☐ Long-Haul ☒



Index base year 2015.  
Index values for each wave are calculated based on corresponding waves in previous years.

## INTENTION TO TRAVEL OUTSIDE THE REGION OF RESIDENCE BETWEEN MAY-AUG 2022 (% OF RESPONDENTS)



Sample size per market: 1000

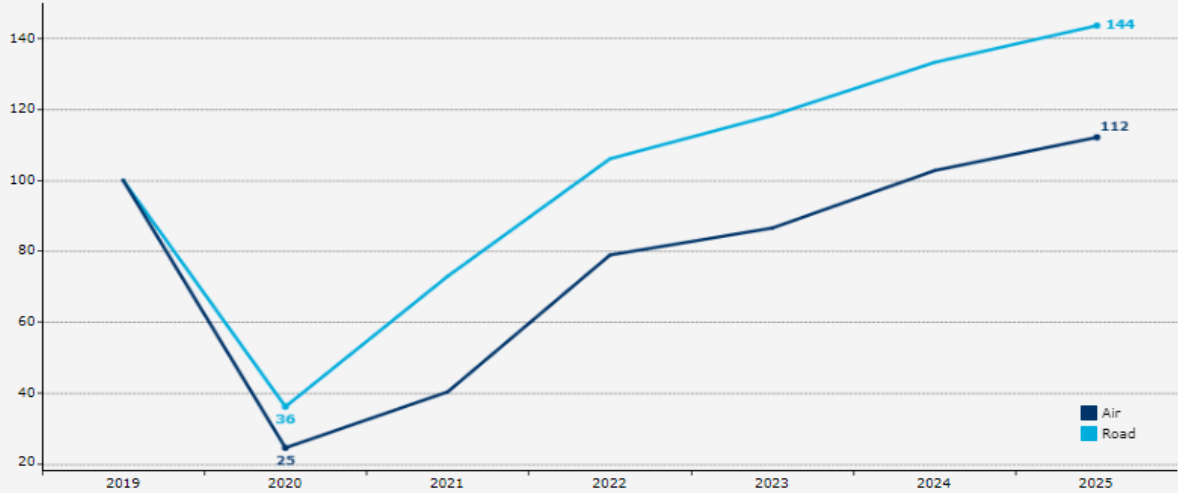
# Arrivals by Purpose of Trip and Mode of Transport

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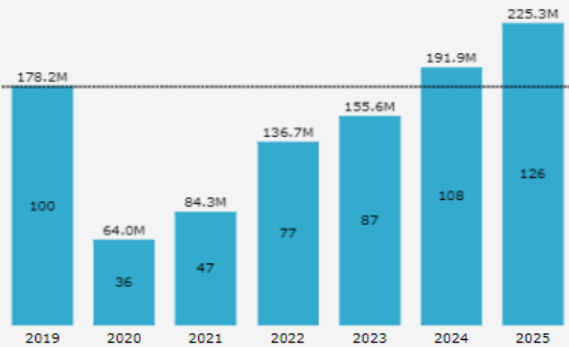
## Visitor Arrivals to Europe by Mode of Transport

Index (2019 = 100), includes European and non-European arrivals



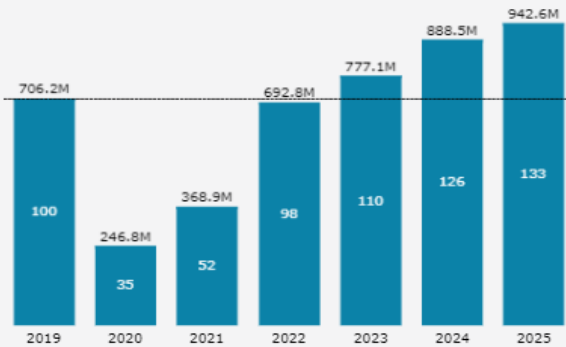
## Business Visitor Arrivals to Europe

Index (2019 = 100), includes European and non-European arrivals



## Leisure Visitor Arrivals to Europe

Index (2019 = 100), includes European and non-European arrivals



## Business & Leisure Spending (Europe)

Index (2019 = 100)

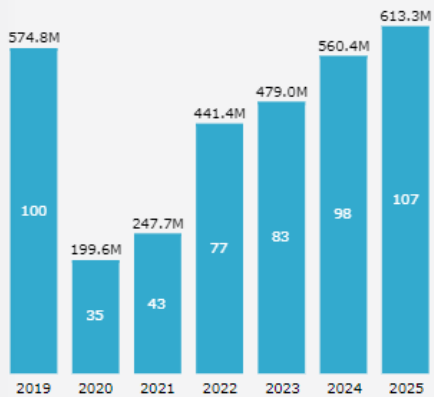
# Intra-European Travel

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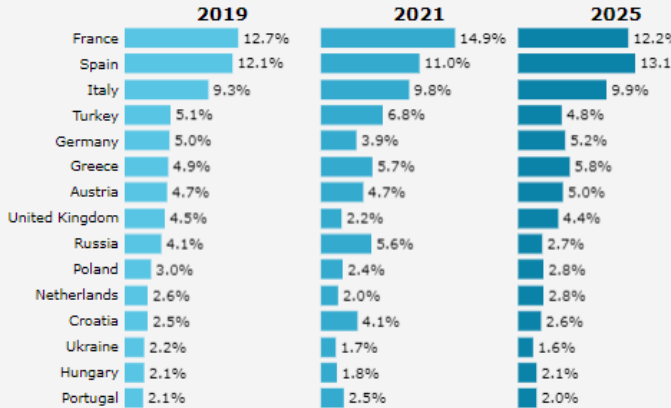
## Intra-European Visitor Arrivals

Index (2019 = 100)



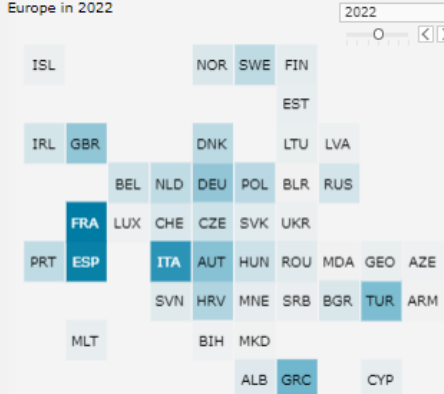
## Top Intra-European Travel Destinations

Destination's share of total intra-European arrivals



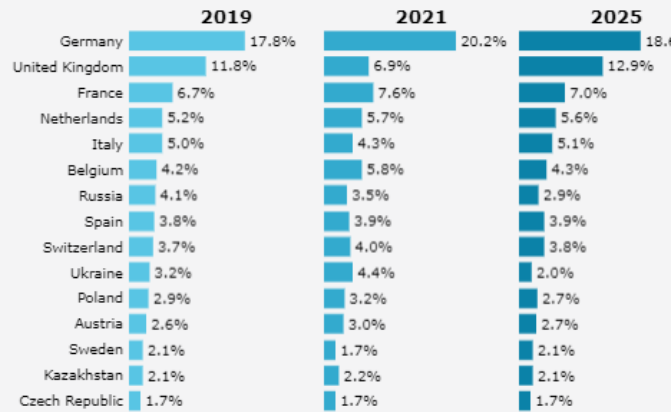
## Top Intra-European Arrivals Destinations

Destination's share of total visitation by European travellers to Europe in 2022



## Top Intra-European Source Markets

Source market's share of intra-European travellers

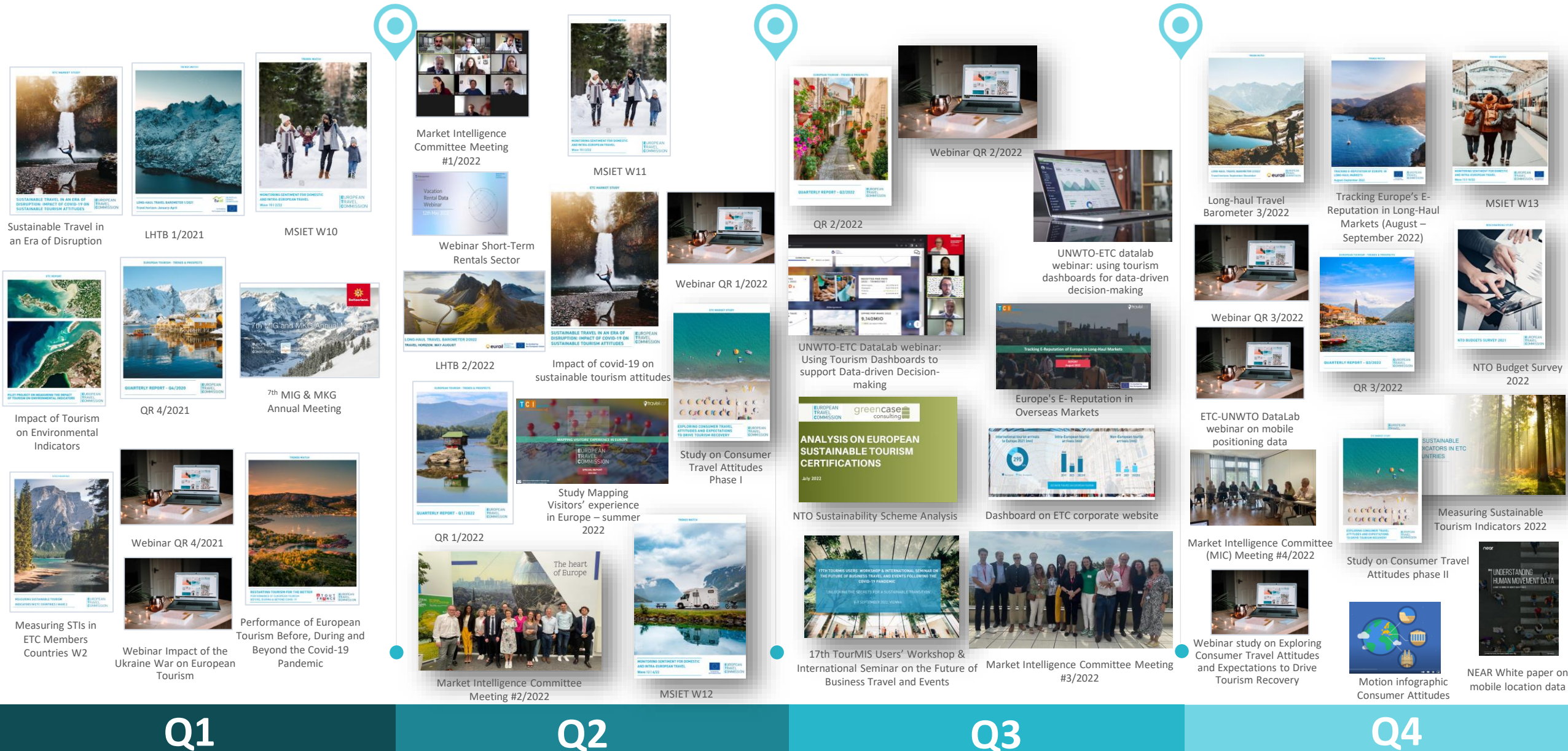


## European Visitor Arrivals to Europe

EU27 vs non-EU Countries



# ETC RESEARCH ROADMAP 2022





# JOINING FORCES TO LEVERAGE THE POWER OF DATA IN TOURISM

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# UNWTO-ETC DATALAB NETWORK

**NTOs Working group:**  
Ireland, Malta, Flanders, The Netherlands, Slovenia Denmark and Portugal.

**UNWTO-ETC Datalab survey (November 2021)**

**31 European NTOs**  
across Europe

**30 May 2022** - Official launch of the network

Create a community for knowledge sharing to enhance market intelligence

## Practical Sessions:

- **Tourism Dashboards** to support tourism decision-making
- **Tourism Expenditure** data
- **Mobile positioning** data
- **Destination E-reputation**
- **New Technologies & Tools** NTOs can Use in 2023

- Knowledge sharing
- Capacity building
- Identifying partners



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# EU CODE OF CONDUCT FOR DATA SHARING IN TOURISM

Drafting Committee



- **Build trust** between relevant tourism stakeholders
- Provide **strategic support** on reciprocal profits in data sharing partnerships in the tourism industry
- **Foster data sharing** in the tourism sector within the EU
- Foster the EU's initiative to establish a **European strategy for data sharing guidelines** and principles
- Ensure a **level playing field** for the public and private sectors in data sharing



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# EU CODE OF CONDUCT FOR DATA SHARING IN TOURISM

## WHAT YOU WILL FIND

Introduction

Goals & Objectives of the Code of Conduct

Scope of the Code of Conduct

Why engage with the Code of Conduct?

Definitions

Common principles for data sharing

Case studies and toolboxes

Overview of EU regulatory framework

Checklist for Data Sharing Agreements

## ACHIEVEMENTS AND NEXT STEPS

First draft of the Code of Conduct

Consideration for institutional expertise

Expert/stakeholder consultation

Engagement with European Tourism  
Manifesto

Formal publication January 2023



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# EU TOURISM DATA SPACES



- Develop a **secure and trusted data space** to enable the tourism sector to share and access data allowing for an increase in its **economic and environmental performance**.
- Facilitate the **sharing, processing and analysis** of various types of data produced, maintained and used by the **key actors of the sector**.
- Provide **easy, cross-border access to key datasets**, deploying trust mechanisms (security and privacy by design).



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DO SOMETHING GREAT



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An aerial photograph of a dense forest with a road running vertically through the center. The road has a dashed white line down the middle. The trees are mostly green, with some yellowing on the left side, suggesting autumn. The image is divided into four quadrants by a horizontal and vertical line that intersect at the center of the road.

**ECONOMIC**

**SOCIAL**

**ENVIRONMENTAL**



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# THANK YOU FOR YOUR ATTENTION!



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