REQUEST FOR PROPOSALS

Framework agreement for Impact Analysis of Thematic Digital Promotional Campaigns

<table>
<thead>
<tr>
<th>Award entity</th>
<th>European Travel Commission</th>
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<tr>
<td>Issuance date</td>
<td>09/12/2021</td>
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<tr>
<td>Deadline for applications</td>
<td>12/01/2022</td>
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1. INTRODUCTION

This Request for Proposals (RfP) is launched in the framework of an ad-hoc grant of the European Commission (EC) to the European Travel Commission (ETC) with the aim to support the promotion of thematic trans-European tourism products in third countries.

This RfP contributes to the implementation of ETC’s marketing strategy “Horizon 2022”, which aims to build a distinctive image of Europe as a travel destination in long-haul markets, maintain Europe’s market share and better disperse traveller flows (in terms of geography and seasons) while taking into account residents’ aspirations for sustainable tourism growth.

The present document is intended as a guideline based on ETC’s goals and requirements. A clear understanding of these goals and requirements should be reflected in the proposal. Applicants are asked to interpret all aspects of this document carefully, yet creatively, using their business intelligence, experience in the tourism sector, research methodological approaches and market research expertise to propose the best possible solution for the project. Additional solutions, research methods and suggestions that contribute to achieving the objectives of the project are welcome and should be clearly outlined in the proposal.

CONFIDENTIAL: The information in this document may not be used for any purpose other than to respond to this Request for Proposal. This document is and will remain at all times, the property of ETC.

1.1. ABOUT THE EUROPEAN TRAVEL COMMISSION (ETC)

The European Travel Commission (ETC) is an international non-profit making association of official National Tourism Organisations (NTOs) in Europe. The organisation was established in 1948 and is headquartered in Brussels (Belgium).

ETC’s mission is to support the promotion of Europe as a tourist destination in major long-haul markets. For its member NTOs, ETC also provides a broad portfolio of market intelligence services and encourages the sharing of best practices. ETC is established as a private body (AISBL) under the law of Belgium.

Moreover, within the scope of its mission, ETC works regularly with the European Commission on a series of initiatives aimed at maintaining Europe’s position as the world’s leading travel destination.

Further information about ETC can be found on the website www.etc-corporate.org.
2. INFORMATION ABOUT THE PROJECT

2.1. PROJECT OVERVIEW

International tourism remains an important driver for economic growth, social development and job creation in Europe. In the last years, Europe held the largest share of worldwide tourist arrivals marked by a record number of 746 million international tourist arrivals in 2019. Nevertheless, the impact of the COVID-19 global health crisis and travel restrictions implemented to curb the spread of the virus continues to be felt across European destinations. Over the period January-July 2021, Europe saw a dramatic 77% decline in international tourist arrivals compared to the same period in 2019\(^1\). In 2021, several destinations enjoyed a better-than-expected summer season owing to improving vaccination coverage, the EU Digital COVID Certificate and relaxed restrictions for fully vaccinated foreign travellers. Nevertheless, travel volumes are still far from the pre-pandemic days with visitor arrivals to Europe forecast to be 60% below 2019 volumes by the end of 2021 and tourism growth not expected to reach 2019 levels until 2024\(^2\). The expectation that pre-crisis levels of tourism demand will not bounce back before 2024 continues to provide tourism destinations with an opportunity to reshape the industry towards one that equally benefits travellers, local communities, the environment and local economies.

While Europe continues to be one of the most diverse destinations in terms of the broad spectrum of experiences and products available, it still has a consumer appeal that is too generic and a rather undifferentiated image, particularly in long-haul markets. To retain its position as the world’s number one tourist destination in the coming years, Europe as a tourism destination is striving to move its brand forward, from a generic image to a more differentiated one.

Furthermore, many consumers’ choice of leisure tourism destinations is determined by their personal interests and the type of experiences they wish to enjoy. European destinations are therefore called to promote tourism products and experiences that are strongly affiliated with Europe’s identity and connect to people’s passions. This approach shall strengthen Europe’s brand associations and create the basis for differentiation from its competitors.

Promoting Europe to a passionate niche community of travellers is likely to be more impactful than targeting mass audiences. This is translated into a positioning that connects deeper with an audience segment that is not only based on demographics, but on psychographics (interests) too.

To this end, the ETC marketing strategy, “Horizon 2022”\(^3\) has changed the paradigm of traditional volume-driven destination marketing to an approach based on quality in order to attract the ‘right visitor’. As opposed to the classic geographic market segmentation, this new approach proposes a cross-border interest-based market segmentation. A new way of promoting Europe based primarily

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1 World Tourism Organization (UNWTO)
2 Tourism Economics
3 Please read the strategic document on https://etc-corporate.org/our-campaigns/horizon-2022/.
on thematic products and experiences that align with consumer interests, values and lifestyles across markets.

Under the framework of this strategic approach, ETC, in cooperation with partners, regularly runs global promotional campaigns that showcase stories around specific interests, including the three mentioned below.

The purpose of this RfP is to conclude a framework service agreement with an experienced consultant (hereinafter referred to as the contractor) to produce a series of analytical reports that provide insights into consumers’ responses to ETC’s global promotional campaigns. Results shall serve to analyse and assess the impact, effectiveness and degree of success of a series of digital thematic promotional activities.

ETC conducts regular research on global lifestyle trends, consumer behaviour and the perceptions of Europe as a travel destination. Based on assessments of available data, synergies with existing pan-European initiatives and industry consultation, ETC selected three priority passion points that can distinguish Europe from other competing destinations (Please see ANNEX 1 for a synopsis of the strategic relevance of each of the three passion points):

- **Creative Industries and Contemporary Arts:** Inspiring experiences and stories framed around the local cultural scene and lifestyle (contemporary arts, architecture and design, fashion, music, street and performing arts) of small or medium size urban areas (creative cities).

- **History and Ancestry:** Ancestry and heritage-related experiences and stories in connection with historical places and events (places of memory, contemplation and commemoration) which exerted an influence in world history.

- **Nature and the Outdoors:** Inspiring experiences and stories framed around human- or nature powered journeys that connect with the outdoors, the local culture, food, and people in rural areas, in line with the ethos of the Slow Adventure movement.\(^5\)

The activities subject to this Request for Proposals are co-financed by the European Union.

### 2.2. OBJECTIVES

The purpose of the project is to evaluate the overall impact of ETC’s global promotional campaigns on target audience’s perceptions of the “Destination Europe” brand. The project should deploy a set of research techniques to monitor and assess the performance, effectiveness and degree of success of a series of thematic digital promotional activities based on a sound system of the collection of KPIs. Results shall provide insights into the impact of these campaigns on the attitudes

\[^4\]**Mainly web and social media channels**

and sentiment of global target niche audiences relating to the brand image of Europe and of the particular showcased destinations.

2.3. TARGET GROUPS

The promotional activities to be analysed under this project are targeted towards global niche audiences, whose main motivation is to travel to a certain place to enjoy experiences related to a specific passion or interest. Target global niche audiences include mainly the **United States, China, Canada, Australia, Japan and Brazil**. Within these interest-based groups, promotional initiatives are specifically targeted towards affluent **Free Independent Travellers (FITs)** from urban "melting pots", who are at the dreaming and/or consideration stage of their travel cycle.

Since the overall approach of the promotional campaigns is a global one, ETC is not looking into reporting on specific markets. Instead, the digital campaign analyses should provide results on the different themes as specified under point 3.1 Deliverables.

3. REQUIREMENTS AND DELIVERABLES

Proposals which are not compliant with the requirements below will be excluded from further evaluation.

The contractor is expected to deliver the following services having the below minimum and technical requirements.

3.1. DELIVERABLES

The research exercise should provide an **in-depth impact analysis** of the thematic promotional campaigns (for the individual campaigns and individual themes). ETC envisages the primary research to consist of a series of **post-campaign analytical reports** in electronic format (Microsoft Word or PowerPoint) with the outcome of the analysis.

The contractor commissioned to execute the project will be expected to produce the following types of reports:

- Analytical reports of individual thematic promotional campaigns;
- Analytical reports for multi-thematic promotional campaigns;

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6 Creative Industries and Contemporary Arts, History and Ancestry and Nature and the Outdoors
7 Each campaign will be based on one theme with multiple partners/brands (cooperative marketing campaigns)
8 Campaign will be based on multiple themes and one brand (Europe)
Analytical reports consolidating the results for each individual pan-European theme.

- Each individual analytical report should include:
  - An introductory executive summary;
  - A clear and detailed presentation of the main results based on the items specified under point 2 “Information about the project”;
  - A detailed description of the applied methodology and techniques (as Annex).

- Each individual analytical report should be accompanied by:
  - A summary PowerPoint presentation (if impact report is provided in Microsoft Word format).
  - A short webinar presentation summarising the main outcomes of each impact report.

Key results should be supported by means of charts, maps and tables that are both visually appealing and highly informative.

All reports should be in British English (as opposed to American English). The commissioned contractor is responsible for ensuring that the final document is of sufficiently high quality (both the English language and editing) to enable speedy publication without further editing.

3.2. MINIMUM REQUIREMENTS

Each analytical report should cover the following areas:

- a) The digital campaign analysis should be based on cutting-edge qualitative and quantitative tools and techniques, such as real-time social listening, web crawling, thorough keywords and direct mentions assessment, online discussions analysis, etc.

- b) Deploy a sound research method/s that allows to thoroughly capture, track, analyse and map consumers’ responses (e.g. sentiment/tone, trends and drivers, etc.) relating to the pan-European themes under examination. Results should enable the measurement of the perceptions on the destination brand and the impact of the thematic digital marketing campaigns on selected niche audiences across the globe (excluding Europe), mainly the United States, China, Canada, Australia, Japan and Brazil. The proposed research methodology should also consider and make use of the necessary tools and techniques to capture Chinese online content, e.g. analysis on Weibo/WeChat, etc.

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9 Nature and Outdoors, History & Ancestry and Creative Industries & Contemporary Arts (Creative Cities).
10 ETC will make sample reports available to the contractor as well as design guidelines for the final publication.
c) Analyse online conversations to gauge mood (positive, neutral, negative), and the attitudes and perceptions (opinions, consumer views) of a target audience experience with regards to a given thematic promotional campaign. The sentiment analysis should identify shifts in perception, i.e., whether the general conversation around the different themes is changing as well as trends and patterns in sentiment.

d) Assess campaign resonance, i.e., “How far did the campaign drive conversations associating Europe with a given theme” and the sentiment impact, e.g., experiential and emotional drivers associated with the thematic campaign, main European destinations associated with a given sentiment and theme, reactions to given campaigns, etc.

The evaluation of the perceptions and sentiment and the degree of success of the thematic campaigns should be based on a solid and consistent system of key performance indicators (KPIs)\(^\text{11}\), which should include specific details on their measurement, calculations and results. These campaign success indicators should allow the understanding of not only the ‘what’, but also the ‘why’ or ‘how’ of consumers’ responses to the different thematic campaigns.

The awarded contractor should provide a detailed set of KPIs that will allow measuring key metrics that provide relevant and useful insights, e.g., number of mentions, sentiment around mentions, share of voice, social influence, changes in volume over time, Europe brand reach, etc.

Ultimately, the analysis should disclose how far a given campaign drove conversations associating Europe with the themes under examination and impacted the selected niche audiences across the globe. The awarded contractor should specify the type of content (e.g., opinions, conversations, etc.) associated with a given theme that will be crunched/analysed. ETC will provide more detailed information (e.g. information about target audiences, campaign assets, keywords, hashtags, etc.) about the scope of the promotional campaigns in due course to facilitate the preparation and analysis of the digital promotional activities that form part of this agreement. Please see past campaigns for reference\(^\text{12}\). Campaigns may run simultaneously depending on the date they are launched and the contractor will be able to collect and analyse data already at the start of the campaign.

ETC expects the aforementioned activities to be developed and executed by experts who adhere to acknowledged standards and recommendations of latest and ‘state-of-the-art’\(^\text{13}\) research practices to monitor digital campaigns.

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\(^\text{11}\) The Key Performance Indicators (KPIs) or campaign success indicators should not only be part of the analytical reports but specific details (metrics, calculations, etc.) should also be included in the proposal.


\(^\text{13}\) Best available since it makes use of the most modern techniques and technology.
3.3. TECHNICAL REQUIREMENTS

- Publicity

- The deliverables must clearly acknowledge ETC’s and the European Union’s financial contribution. In this respect, the contractor will be required to give prominence to the following logos on the materials (reports, PowerPoint presentations) produced in the framework of this project:

  Logo of ETC

  Name and emblem of the European Union

- Style

  All deliverables need to be in line with the style guidelines provided by ETC

- Assignment of rights

  The contractor shall explicitly provide ETC and the European Union with a worldwide, royalty-free, non-exclusive, perpetual (for the duration of the applicable copyright) license to exercise the Intellectual Property Rights of all materials created for or in the course of the project as stated below:

  a) to reproduce the project material or incorporate the project material into other material, and to reproduce it as incorporated in such other material;

  b) to create and reproduce derivative works from the project material;

  c) to distribute copies and display publicly the project material, whether independently or as part of other material;

  d) to distribute copies and display publicly derivative works from the project material.

  The contractor should obtain any licenses or permits needed.

3.4. PROCEDURE TO PLACE ORDERS

The contract between ETC and the contractor will be a framework agreement whose implementation is only carried out through separate orders placed by ETC according to actual needs. ETC foresees the following method for placing orders:
• ETC informs the contractor by email about the number of reports needed and their type(s). ETC shares with the contractor the necessary information about the digital promotional campaigns to facilitate the impact analysis. The contractor then proceeds to execute the task in accordance with the pre-negotiated terms and conditions.

• The contractor maintains a list or register in which every order placed by ETC is included and from which at least the following information can be derived: the number of placed orders, the value of each order as well as the total value of all placed orders.

• This list or register must be available to ETC at any time during the term of the assignment.

• The contractor is expected to provide regular updates on progress and performance of all placed orders.

3.5. IMPLEMENTATION PERIOD

The implementation period of the framework agreement is expected to start in January 2022 for a duration of 3 years. The duration of the framework agreement may be extended for a further period to be determined upon mutual agreement between ETC and the contractor. Both start and ending dates are to be determined and subject to the evolution of the COVID-19 pandemic.

The duration of the framework agreement is independent of the duration of each individual order placed by ETC in the framework of this agreement, which should include a specific start and end date. ETC foresees that the contractor will be asked to conduct at least 3 analytical reports for individual thematic promotional campaigns, one analytical report for multi-thematic promotional campaigns and one consolidated report (see 3.1) during the first half of 2022.

4. BUDGET

The maximum available budget per type of report is as follows:

- Analytical reports for each individual thematic promotional campaign for a maximum of 5,000 EUR per report;
- Analytical reports for multi-thematic promotional campaigns for a maximum of 18,000 EUR per report covering 6-long haul markets;\(^{14}\)

\(^{14}\) Price is subject to the number of markets covered in the multi-thematic promotional campaign. In the event that the multi-thematic promotional campaign covers a smaller number of long-haul source markets, price should be adjusted accordingly.
Analytical reports consolidating the results for each individual pan-European theme for a maximum of 2,000 EUR per report.

Invoicing will be done after submission of each final report. ETC will first approve that the deliverables are correct and then ask the contractor to submit an invoice.

5. SUBMISSION OF PROPOSALS

Proposals must be clear, concise (not exceeding 20 pages in total) and written in English, so there can be no doubt as to meaning and figures. Proposals should include:

1) Brief company profile

2) Detailed and clear description of the primary research methodology, tools and techniques to collect, capture and measure the sentiment and the impact of the thematic promotional campaigns on the selected global niche audiences.

3) Detailed description of the approach to assess the perceptions of thematic campaigns and thus, their degree of success.

4) Detailed description of campaign success indicators (or KPIs) and how they are expected to measure campaign impact and success. A description of the metrics under consideration, their calculations and result interpretation.

5) Detailed description of the structure and content of each type of analytical report.

6) References to relevant experience in delivering comparable work as outlined in 3.1. Deliverables and 3.2. Minimum Requirements (i.e., case studies or reference list - including project goals, processes, dates and verifiable deliverables)

7) Timeline for the production and delivery of each report type

8) Description of team credentials, field of expertise and roles of the people involved in the project

9) Detailed breakdown of the economic offer per type of report:

- the price for an analytical report for an individual thematic promotional campaign;
- the price for an analytical report for a multi-thematic promotional campaign;
- the price for an analytical report consolidating the results for an individual pan-European theme.

Each price should be quoted in Euro and exclude VAT and other taxes which may be recoverable by ETC (being a private VAT-registered entity based in Belgium). Each price
should include an estimate of all costs following the scope of work of the project (including third party costs, if any). Any item that is essential for the smooth running of the project, as indicated within this document, even though not specified, shall be read as included in the list of requirements. Discount pricing depending on number of reports purchased is not allowed.

Proposals must be submitted in electronic format via the following form on the ETC website: https://etc-corporate.org/requests-for-proposals/submission-form/

5.1. DEADLINE FOR SUBMISSION
Proposals must be received by 12 January 2022 at 23:59pm (CET).

The proposals must be valid for at least 6 months after the submission deadline.

5.2. QUESTIONS
Questions about this tender must be sent in written form via the contact form on the ETC website (https://etc-corporate.org/impact-analysis-for-thematic-digital-marketing-campaigns-framework-agreement/) with the subject “Online campaign analysis” until 4 January 2022 at 12:00pm (CET).

ETC will have published the answers to all received questions on the above website by 5 January 2022 18:00pm (CET) at the latest.

6. AWARD CRITERIA
Applications will firstly be assessed against the quality criteria and secondly against the financial criteria. The relative weights assigned to each of them are described below. Tenders scoring less than 50 points in the total points for quality criteria will be excluded from the rest of the assessment procedure.

- **Quality criteria**: 60% of the total evaluation score
- **Financial criteria**: 40% of the total evaluation score

\[
\text{Final score} = (\text{lowest price} / \text{proposal price}) \times 100 \times 0.4 + \text{quality score} \times 0.6
\]

Where:

\[
\text{Proposal price} = \text{price for one analytical report for an individual thematic marketing initiative} + \text{price for one analytical report for a multi-thematic marketing campaign} + \text{price for one analytical report consolidating the results for an individual pan-European theme}
\]
Lowest price is the lowest amount resulted after applying the above ‘Proposal price’ formula for each proposal

6.1. QUALITY CRITERIA

The quality of the proposal is defined as a minimum set of delivered services as described in section “3.2 Minimum Requirements”. Each of these criteria and the relative weights assigned to them are described below.

<table>
<thead>
<tr>
<th>Quality criteria</th>
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<tbody>
<tr>
<td><strong>Criterion 1. Company profile and qualifications of the project team</strong></td>
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<tr>
<td>The extent to which the credentials of the applicant and the qualifications,</td>
</tr>
<tr>
<td>fields of expertise, roles and responsibilities of the proposed project team are</td>
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<tr>
<td>suitable for the execution of the project.</td>
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<tr>
<td>Weight: 10%</td>
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<tr>
<td><strong>Criterion 2. Experience</strong></td>
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<tr>
<td>o Proven experience in delivering comparable work, including proven experience</td>
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<tr>
<td>with the proposed methodological approaches.</td>
</tr>
<tr>
<td>Weight: 10%</td>
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<tr>
<td><strong>Criterion 3. Project goals</strong></td>
</tr>
<tr>
<td>o Complying with the purpose of the project (does the research design meet</td>
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<tr>
<td>ETC’s goals?)</td>
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<tr>
<td>o Complying with the structure outlined in the Request for Proposals (does the</td>
</tr>
<tr>
<td>proposal correspond to everything ETC is looking for?).</td>
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<tr>
<td>o Overall clarity of the proposal.</td>
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<tr>
<td>Weight: 20%</td>
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<tr>
<td><strong>Criterion 4. Methodological approach</strong></td>
</tr>
<tr>
<td>o Quality of proposed primary research methodology</td>
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<tr>
<td>o Overall approach, tools and techniques to collect primary research</td>
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<tr>
<td>o Quality and approach to collect, capture and measure the perceptions and the</td>
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<tr>
<td>impacts of the thematic digital marketing campaigns on selected niche</td>
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<td>audiences globally.</td>
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<tr>
<td>Weight: 40%</td>
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<td><strong>Criterion 5. Added value</strong></td>
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<tr>
<td>o The extent to which the proposal offers feasible services and/or deliverables</td>
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<tr>
<td>that add value to the minimum requirements and deliverables.</td>
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<tr>
<td>o Level of innovation and creativity brought to the project.</td>
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<td>o Level of flexibility brought to the project to provide tailor-made research.</td>
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<tr>
<td>Weight: 10%</td>
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<tr>
<td><strong>Criterion 6. Timeframe</strong></td>
</tr>
<tr>
<td>o Timeline for the production and delivery of each type of report.</td>
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<tr>
<td>Weight: 10%</td>
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</tbody>
</table>
Each quality criterion will be given a score in a range from 0 (zero) points to 10 (ten) points in accordance with the following scale:

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Not available/not provided. The application fails to address the criterion or cannot be assessed due to missing or incomplete information.</td>
</tr>
<tr>
<td>1-2</td>
<td>Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.</td>
</tr>
<tr>
<td>3-4</td>
<td>Fair. The application broadly addresses the criterion, but there are significant weaknesses.</td>
</tr>
<tr>
<td>5-6</td>
<td>Good. The application addresses the criterion well, but a number of shortcomings are present.</td>
</tr>
<tr>
<td>7-8</td>
<td>Very good. The application addresses the criterion very well, but a small number of shortcomings are present.</td>
</tr>
<tr>
<td>9-10</td>
<td>Excellent. The application successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.</td>
</tr>
</tbody>
</table>

Proposals scoring less than 50 points in the total weighted points for quality criteria will be excluded from the rest of the evaluation procedure.

7. FINAL PROVISIONS

This Request for Proposals is in no way binding on the European Travel Commission, nor any of the European Union institutions. Any contractual obligation commences only upon signature of the particular agreement between ETC and the contractor.

ETC reserves the right to accept or reject any or all proposals received as a result of this Request for Proposals as well as to cancel this project, either partially or totally. In the event of cancellation of this Request for Proposals, this should not entail any financial obligation from ETC towards any applicant.

Submission of a proposal implies acceptance of the terms and conditions set out in this document.
8. ACCOMPANYING DOCUMENTATION

ANNEX 1 – Pan-European Themes and Experiences

<table>
<thead>
<tr>
<th>PASSION POINT</th>
<th>Creative Cities (Creative Industries and Contemporary Arts)</th>
</tr>
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<tbody>
<tr>
<td>PROFILE OF THE TARGET GROUP</td>
<td>Community of city life enthusiast who share a passion for contemporary arts, creative industries (architecture, fashion, design and crafts), vibrant urban lifestyle and vivid cultural scene. They seek new experiences to enrich their life and establish new relationships with like-minded people in the places they visit. They have the need to indulge in new cultures and a desire for excitement, authentic and out of the ordinary experiences. They want to experience everyday local life of the destination by interacting with the place, its people and customs. They grant attention to the atmosphere of the destination they visit, defined by the vibrancy of the creative and cultural offer. A large proportion of this community are highly educated young professionals with a high socio-economic status. Spring and autumn are their preferred seasons for travelling.</td>
</tr>
<tr>
<td>STRATEGIC RELEVANCE</td>
<td>Recent years have seen the emergence of “creative tourism” as a specialised niche within cultural tourism. Creative tourism development has the potential to generate new tourism products, increase and diversify demand, and enhance place quality and attractiveness. Research shows that creative industries have an important role in attracting overseas visitors to European destinations and offer considerable potential for future growth. Encouraging more visitors to get involved with these activities once they have decided to come to Europe in the first place should help drive repeat visits and recommendations of Europe as a destination. Creative tourists spend less time in major gateway cities, suggesting the potential for creative forms of tourism to spread visitors to other towns or smaller cities.</td>
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</table>
| HORIZON 2022 GOALS | • Build brand recognition. Position Europe as a premium lifestyle destination for urban creative minds  
• Raise awareness of experiences and destinations related to creative industries and contemporary arts in Europe  
• Increase dispersal of tourist flows (place and time) to lesser-known destinations (away from current tourist hotspots)  
• Connect visitors with local communities of like-minded creative minds  
• Increase loyalty and repeat visitation |

15 European Travel Commission (2019). European Tourism Passion Communities
**EXPERIENCES**

Uncommon and engaging experiences framed around local cultural scene and lifestyle (contemporary arts, architecture and design, fashion, music, performing arts, street culture, gastronomy, nightlife and shopping) in small or medium size urban areas\(^\text{18}\) (with a minimum of 50,000 inhabitants) or new creative areas in capital cities (away from traditional heritage sites and crowded touristic venues). These experiences include integrative and interactive activities allowing the target audience to co-create the experience and develop their own creative skills.

**KEY MESSAGE**

Europe has traditionally been known as the “old continent”, but even today, people in Europe are setting new world trends. Europe is creating the future by reinventing its past and rich cultural heritage. Emerge into the vibrant lifestyle and contemporary cultural scene of Europe, where creativity is all around.

**PASSION POINT**

History and Ancestry

**PROFILE OF THE TARGET GROUP**

Explorers of cultural identity and roots\(^\text{19}\) with a particular interest in significant events that marked the world’s and/or their personal history. This includes old and new generations who are interested in history and engaging in new deep experiences that connect to today’s world. They enjoy exploring aspects relating to the cultural heritage, historical ties and ethnic identity of the destinations they visit. This community tends to have higher income in comparison with conventional long-haul travellers.

**STRATEGIC RELEVANCE**

This theme is linked with the growing niche trend for educational tourism and constructive tourism\(^\text{20}\) as a way to upgrade the leisure activity itself and the person undertaking it. The rise in popularity of this theme is also supported by the increasing popularity of family genealogy as a TV genre\(^\text{21}\) and new technologies supporting genealogy research. Many popular travel destinations, especially those that have experienced a large diaspora are aware of the potential of roots-travel niche and its impact on their tourism industry. The rise of operators, agencies, and guides dedicated to this travel segment has become apparent in recent years.

European destinations outperform other regions as the preferred destination for the community of history and culture enthusiasts\(^\text{22}\). The years 2019-2020 provide momentum to market Destination Europe to this community of travellers as numerous commemoration and related events will take place in different European destinations to mark the 75\(^\text{th}\) anniversary of the end of the Second World War. This theme moves from the consumer’s curiosity for the darker side of history to a much more complex search for authentic representation, critical assessment whilst abroad and ultimately self-development in this search of generational sense of self. This theme also provides an opportunity for critical reflection with regard to destinations’

\(^{18}\) The Culture and Creative Cities Monitor (European Commission, 2017) provides a list of 168 cities in 30 countries which meet this criterion.

\(^{19}\) European Travel Commission (2019). European Tourism Passion Communities


\(^{21}\) Examples of international television shows: TLC’s Who Do You Think You Are, PBS’ Finding Your Roots and Genealogy Roadshow, and CNN’s Roots.

\(^{22}\) European Travel Commission (2019). European Tourism Passion Communities
own identities and history, with benefits not only for tourists, but locals as well.

| HORIZON 2022 GOALS                  | • Build brand recognition  
|                                   | • Raise awareness of experiences and destinations related to common European history and heritage  
|                                   | • Increase dispersal of tourist flows (place and time) to lesser-known destinations  
|                                   | • Connect visitors with local communities of like-minded minds  
|                                   | • Increase loyalty and repeat visitation |

| EXPERIENCES                       | Ancestry and heritage-related experiences in connection with historical places and events (places of memory, contemplation and commemoration) which exerted an influence in world history. Personal stories that keep history alive and convey positive emotions and memories, as opposed to potential negative perceptions, through travel-related experiences which connect to today’s world. |

| KEY MESSAGE                       | Europe stands for the fundamental values of freedom, democracy and equality. Europe was the main stage for a majority of the world’s most important historical events, which exerted a significant influence and shaped the modern world we live in today. These events are an essential education feature that give a crucial lesson to learn if you are to understand your place in the world today. |

| PASSION POINT                     | Nature and the Outdoors |

| PROFILE OF THE TARGET GROUP       | Community of immersive explorers\(^23\) who believes in the importance of making time to spend in nature and is most often activity driven. Nature is an important element in their lives. They have a strong desire to connect more with nature, but their working pattern and urban lives often prohibits this. They seek to fulfil their connection with nature through tourism and recreational experiences. They favour slow, immersive journeys through wild places and natural spaces in search for health and well-being. In a globalised world where people feel they have seen everything, they value original nature, clean environments, unbuilt landscapes and quietness. They are early adopters which means they are generally more willing to try new destinations, activities, and travel products. A large proportion of this community are high-value customers who are willing to pay a premium for exciting and authentic experiences. |

| STRATEGIC RELEVANCE               | The adventure travel market is one of the fastest growing niches of the tourism industry worth USD263 billion per year. Research\(^24\) shows that adventure travel attracts high-value customers, supports local economies (it is estimated that 67% of the trip cost per guest remains in the local region) and encourages sustainable practices. Operators are also seeing growing interest in adventure travel as customers are seeking out alternatives to the traditional destinations. For companies and destinations, adventure travel |

\(^{23}\) European Travel Commission (2019). Tourism Passion Communities  
attracts visitors outside peak seasons, highlights the natural and cultural values of a destination, thereby promoting its preservation, and creates resilient and committed travellers. The expansion of adventure tourism creates new opportunities, particularly in remote areas where it can be developed without extensive new infrastructure, and thus generating income and employment.

| HORIZON 2022 GOALS | • Build brand recognition. Position Europe as the home of the emerging slow adventure movement  
| | • Increase dispersal of tourist flows (place and time) to lesser known destinations  
| | • Connect visitors with local communities of like-minded adventure seekers  
| | • Increase loyalty and repeat visitation  

| EXPERIENCES | Experiences framed around human- or nature powered journeys that connect with the outdoors, the local culture, food and people in rural areas in line with the ethos of the Slow Adventure movement  

| KEY MESSAGE | Shift away from ‘what there is in Europe to do’ to ‘how it makes you feel’. Relax, live life at a slower pace and get closer to seldom seen natural areas in Europe. Get involved in unique educational and nature-focused experiences and explore local culture in special sites that are far enough to be uncrowded. Forge deeper connections with the people and the traditions of the places you visit and broaden your perspective on the world. Seven of the TOP 10 developed and developing countries for adventure travel in the world are in Europe. According to the 2018 Environmental Performance Index, the TOP 16 performing countries on environmental issues in the world are European.

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27 https://epi.envirocenter.yale.edu/epi-indicator-report/EPI