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Evaluation of the promotion activities carried out by the European Travel Commission

Final report

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Led by Henningsen Consulting in partnership with Technopolis Group and Delange Analytics

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Executive summary

This is the Final Report of the *Evaluation of the promotion activities carried out by the European Travel Commission*. The study was commissioned by the European Commission DG GROW in November 2021. The work was undertaken by Henningsen Consulting in association with Technopolis Group and Delange Analytics.

The aim of this study was to provide an assessment of the work carried out by the ETC to promote Europe in long-haul markets and intra-EU tourism, considering the actions undertaken under the last four EU grants to the ETC (2016-2021). The assignment covered the following evaluation criteria: relevance, performance and effectiveness, efficiency, coherence, and EU-added value. The evaluation questions have been addressed using data collected through desk research, case studies and interviews.

Relevance: objectives and strategy

Since 2012, ETC has received EU co-financing in the form of grants for programmes of promotional actions to consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations. The objectives of the four grants were shaped by the priorities of the 2010 tourism strategy, the objectives of the 2018 EU-China Tourism Year; the ETC's own marketing strategies: Destination Europe 2020 and later, the Horizon 2022 strategy, and finally the objectives and requirements laid down in the EC calls.

The current framework and its main aims and objectives, principally as outlined in the ETC Horizon 2020 Strategy, have globally been appropriate for steering marketing actions. The strategy's focus on free independent travellers and on niche marketing articulated around selected marketing themes is generally assessed positively and is line with current destination branding trends and approaches of NTOs. The themes which were selected under the 2019 grant have been suitable and sufficiently wide to encompass NTOs national branding themes. The ETC's previous strategy was less focused – which is likely to have been a contributing factor to objective setting which was more focused on deliverables and less focused on the outcomes of these deliverables.

There is broad consensus on the continued need for EU funding to support the branding of Destination Europe in long haul markets. The awareness of Europe's destinations and unique selling points remains inadequate and European funded marketing actions complement NTOs' marketing efforts. Without EU co-funding, and without ETC support, joint marketing actions are unlikely.

While the current framework overall is suitable, the following aspects need attention going forward:

Brand strategy: European Destination branding has been a priority for the grants and various streams of work aimed at addressing this. However a comprehensive, long-term branding strategy for Destination Europe is still to materialise. The design, implementation, and monitoring of a brand strategy for Destination Europe would require earmarked funds.

Objective setting: The objectives which have been defined (in calls and proposals) mostly combine broad aims, with relatively operational objectives, regarding expected deliverables. Specific and measurable outcome objectives, (SMART objectives) are lacking. Greater attention to objective setting and tighter definitions of expected outcomes will help performance reporting and help to steer campaign design.

Marketing themes: The themes selected under the 2019 grant have been suitable and sufficient wide to encompass the NTOs' national branding themes. Going forward, however, a more explicit focus on "Europe as a sustainable tourism destination" is necessary, as is consideration to emerging travel themes, in the post pandemic context.

Funding: If grant funding is to deliver on its stated objectives, the levels of funding need further consideration. While budgetary increases are ultimately a policy decision, the vision and strategy laid down in the Horizon 2022 strategy assumes a larger budget than currently allocated. A larger budget would also be a necessary prerequisite to generate more widespread participation and a structuring impact on actions funded outside the remit of actions implemented under EU funding.

Participation and relevance

Collaborative marketing campaigns, as an approach, is seen as suitable. EU co-funding provides the incentive. However, the number of applications for partner led Co-Ops has remained low. ETC-led Co-Ops, in contrast have generated widespread participation, driving up participation numbers under Grant 8.

Different participation patterns may be observed across NTOs and DMOs. NTOs and DMOs from countries with a high number of international tourist arrivals tend to participate more, emerging destinations less. Emerging destinations, in contrast, participate in more non-Co-Op actions – suggesting different patterns of relevance.

If participation in Co-Ops is to be maximised going forward the double offer of ETC and partner led Co-Ops appears necessary. The two Co-Op models cater for different groups, with different relative advantages. To maximise participation longer-term planning and early communication is necessary. Time is needed, not just for campaign planning, but also to ensure management support within the NTOs. Additional mechanisms would ideally involve support to partnership building.

Effectiveness

The data which is available on the performance does not provide comprehensive evidence to assess – across grants – if the actions overall improved Destination Europe's image and attractiveness and increased visits. However, it does suggest that the activities in the main have met (and often exceeded) the set output and results targets for the actions – whenever these were measured.

For grant 8 there is evidence to suggest that the campaigns implemented have helped improved Destination Europe's image and attractiveness and/or have generated increased bookings and visits. When considering engagement, conversation, and bookings, are a number of very well performing campaigns within the portfolio of recent actions.

For previous grants (grant 6 and 7 relating to the EU China Tourism Year), it is reasonable to conclude that the campaigns and marketing actions implemented within the framework of the ECTY, have contributed to the overall very significant Year on Year (YoY) increases in tourism visits from China observed between 2017 and 2019. The scale of this contribution, however, cannot be assessed, nor is it possible to assess the relative effectiveness of the different marketing actions.

The first pilot campaign, implemented under grant 5 (Treasures of Europe campaign) was largely unsuccessful, when considering stated objectives.

Going forward enhanced attention is necessary on performance measurement and reporting. High quality performance monitoring requires adequate resources. This aspect needs to be considered when drafting subsequent calls for proposals.

In contrast, implementation mechanisms are generally seen as suitable and design is generally assessed positively.

Efficiency

Due to a lack of data, it is not possible to assess the overall cost-efficiency of the campaigns and marketing programmes undertaken. The limited data available shows that the largest single campaign which operated under the Grants (Open to Europe), has been cost-efficient, in terms of generating, searches, booking and hotel revenue. When considering these metrics, other campaigns (for which data is available), have been less successful, but they did not chiefly aim at conversion.

If cost-efficiency measurement is to be a priority going forward, implementation of appropriate metrics and measurement must be considered and prioritised. Reporting of financial data also needs review, so that costing of different lines of actions becomes more readable.

Changes in implementation design, has led to an increased 3rd party financial contribution, contributing to the overall efficiency of EU funds.

Coherence with other EU funding actions and policy priorities

Other EU funding mechanisms provide funding to tourism promotion. There is nothing to suggest that ETC activities funded under the four grants have been clearly overlapping with those. However, evidence of synergies are likewise modest, although ETC Grants, in some cases, have operated in synergy with other COSME initiatives.

Ensuring environmental and social sustainability of tourism is a top EU priority area going forward. Environmental and social sustainability overall is of secondary importance in grant activities. As already highlighted below these issues require greater attention.

EU added value

EU grant funding represents only a fraction of the funding spent across Europe on promotion of European destinations – but represents the bulk of public funding spend on promotion of "Destination Europe" in long haul markets. It cannot be evidenced that European campaigns, are more efficient or effective than national campaigns. As such, the added value is principally qualitative. It is associated with benefits of the marketing actions themselves, complementing NTO and DMO actions, the structuring effect of the grants, especially with regard to the ECTY – and indirectly, learning and sharing. The added value of different lines of action is highly variable across NTOs and DMOs. In particular, marketing in long haul markets allows emerging destinations to test and develop new markets, at lower costs – providing a presence and contacts.

If EU added value is to be evidenced going forward, it will be key that the above recommendations related to objective setting, measurement, evaluation, and cost presentation – as presented in the main report – are accounted for.

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1 Introduction

This is the Final Report for the *Evaluation of the promotion activities carried out by the European Travel Commission* (GROW/05/2021/Lot1). The study was commissioned in November 2021. The work was undertaken by Henningsen Consulting, in association with Technopolis Group and Delange Analytics.

The study was undertaken under the Framework Contract between Technopolis Group and DG COMM, COMM/2020/OP/0020-Provision for Impact Assessment, Evaluations and Evaluation-related studies and services in the field of Communication – Lot 1.

The Final Report is organised as follows:

- The remaining part of this section presents a recap of the objectives and scope of the study as well as a presentation of the promotion activities carried out by the European Travel Commission, under the four grants subject to this evaluation
- Section 2 presents the methodological approach to the study and the work undertaken
- Section 3, 4, 5, and 6 present the evaluation findings
- Section 7 provides the conclusions and recommendations

Several appendices are attached to the report, including the analytical framework used, the list of interviewees, underpinning evidence to support the relevance section, and the full analysis of performance of the grant funded campaigns and other marketing activities.

1.1 Purpose and objectives of the Study

1.1.1 Objectives

The purpose of this assignment is to provide an assessment of the work carried out by the ETC to promote Europe in long-haul markets and intra-EU tourism, considering the actions undertaken under the last four EU grants to the ETC (2016-2021). The study was to assess:

- The relevance of the objectives and strategy underpinning the grants – as well as the JPP approach and underpinning mechanisms – and their continued suitability
- The performance of the marketing programmes and promotional campaigns funded under the four grants – and their relative and absolute effectiveness. In line with the tender specifications the performance assessment concentrate on outputs and results
- The value for money and cost-efficiency of the actions funded under the four grants
- Coherence with other EU interventions in the area of tourism and wider EU policies and priorities – as well as identification of the EU added value stemming from EU funding

1.1.2 Study scope

The evaluation covers the marketing programmes, promotional campaigns and other outreach actions undertaken under four EU grants to the ETC issued in the 2015-2019 period and covering the implementation period 2016-2021. Research activities which have been funded under each of the four grants do not form part of the evaluative scope. The evaluative scope, the duration of grants and allocated budgets is presented in Table 1.

In terms of assessment of effectiveness the study focuses on outputs and results as required by the tender specifications.

Table 1 – Grants covered by the evaluation – budget in '000

Grant reference and year	Implementation Year(s)	Budget ('000)	EU co-funding	Research costs
Grant 5, 2015: Pilot project 'Destination Europe brand – Promoting Europe in the tourism sector	2016 – 12 months (1/1/2016–31/12/2016)	1,199.3	899.4	10%
Grant 6, 2016: Preparing the 2018 EU-China Tourism Year: "Pilot project 'Destination Europe brand	2017 – 10 months (1/1/2017–30/10/2017)	565.4	452.2	9%
Grant 7 2017: 2018 EU-China Tourism Year, Enhancing the Competitiveness of the European Tourism Sector	2017–2019 – 16 months (1/12/2017–31/3/2019)	5,721.6	4,291.3	: 2%
Grant 8: 2019 Destination Europe's umbrella campaign,[1] Cooperation with European Travel Commission on the promotion of Europe as a tourism destination in third country markets	2019–2021 – 30 months, (17/4/2019–31/10-2021)	5,733.2	4,299.9	4%

Source: grant proposals 2015–2019, ETC Budgets for grants and final implementation reports

1.2 ETC grants: objectives and delivery – an overview

1.2.1 Background

Funding of ETC-led marketing actions finds its origin in the 2010 Commission Communication "*Europe, the world's No. 1 tourist destination*".[2] The Communication outlined European strategy for tourism intending to encourage a coordinated approach for tourism related initiatives and a new framework, identifying a set of EU-led actions articulated under four priorities.[3]

Among these four priorities, the priority "*Consolidate the image and profile of Europe as a collection of sustainable and high-quality tourist destinations*" aimed at stimulating tourist demand for Europe. In support of the 2010 Communication, in 2011 the Commission (EC) and the European Travel Commission (ETC) signed *a Joint Declaration on cooperation in the field of tourism and the promotion of Destination Europe*.[4] The Joint Declaration set out six areas of collaboration:

- Promotion of Europe as a destination in long-haul markets
- Development of pan-European routes/itineraries and tourism products
- Collaboration on digital marketing activities
- Destination Europe brand
- Joint event presence
- Research and marketing

Subsequent grants to the ETC have been instrumental in delivering on the EC's Communication and the Joint Declaration. Since 2012, the ETC has received EU co-financing in the form of ad-

[1] https://ec.europa.eu/research/participants/data/ref/other_eu_prog/cosme/wp-call/cosme-wp-2018_en.pdf
[2] COM(2010) 352 final
[3] (1) Stimulate competitiveness in the European tourism sector; (2) Promote the development of sustainable, responsible, and high-quality tourism; (3) Consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations; and (4) Maximise the potential of EU financial policies and instruments for developing tourism.
[4] https://etc-corporate.org/uploads/2020/11/JointDeclaration_signed_ETC_EC.pdf

hoc grants for the implementation of a programme of promotional actions and other supporting activities (under COSME, and previously the CIP).

First grants (2012–2014, out of the scope of this study) were focused chiefly on strategy development and research. From 2015, grant funded actions changed in nature, as well as in scope, with the core of resources more clearly being allocated to promotional actions. The subsequent four ETC grants (2015, 2016, 2017 and 2019 grants), covering the implementation of marketing activities in the 2016–2021 period is covered by the scope of the study.

1.2.2 Objectives of the ETC grants

In the context of the Joint Declaration, in 2012 the ETC developed its strategy (*Destination Europe 2020 – a long-term strategy for Europe as a tourism destination)*[5] to deliver on the Declaration but also (more globally) on the aim of to deliver joint promotional strategy for a "brand Europe".

The 2012 strategy forms part of the underpinning rationale and logic for the grants subject to this evaluation. There are, however, also other aspects which have shaped what has been delivered under the grants – some which are driven by the ETC and some which are driven by the Commission. A notable change has been the ETC strategy *Horizon 2022, go boldly where Europe has never gone before,* which reviewed the ETC's strategic approach to branding Europe. EC drivers of change in particular relate to:

- The requirement to focus funded actions on the 2018 EU-China Tourism Year (Grant 6 and 7), with a mandate by the European Commission to the ETC to play a central role in cooperative marketing campaigns during the EU-China Tourism Year
- Increased focus on, and requirement for, partner involvement and especially the expectation of co-funding, going beyond in-kind financial contribution as basis for the grants
- Focus on the promotion of lesser-known destinations and European routes

In combination, this framework has driven two overarching lines of objectives of the grants subject to evaluation. These are:

- The objective to generate awareness of the European offer in long-haul markets, contributing to the increase of tourist flows to Europe from third-country markets (through promotion of Europe as a tourism destination).
- The objective to consolidate the European brand on in long-haul markets, ensuring consistency and synergy in promotion undertaken by actors operating at EU at national levels and adding value to promotional undertaken at national level – so as to maximise the impact

These objectives are complementary. Delivery on one line of objectives, would impact positively on the other. However, from a conceptual point of view, one line of objectives may be delivered without necessary delivering on the other. The first objective is about effectiveness of the promotional activities which were undertaken under the grants. The second objective is about branding and brand identity, and generation of a "structuring impact" and economies of scale. Branding has played a role in the ETC strategies and activities under all EC grants subject to this evaluation. However, the importance of branding and strategic collaboration has increased with the Horizon 2022 strategy.

[5] No longer publicly available.

1.2.3 Funded campaigns and other actions

Conceptually, ETC grants subject to this evaluation has funded a set of some 4 "headline campaigns" or priorities. They may be summarised under the following headings:

- **Treasures of Europe** (one campaign)
- **The EU-China Year of Tourism** (ECTY) – multiple lines marketing programmes under the umbrella including 8 "sub-campaigns" lead by ETC partners (funded under calls for proposals)
- **Europe invites the Curious Campaign**, with three underpinning themes and including (among other) 6 collaborative B2C sub-campaigns, ETC-led paid outreach and a travel trade reassurance campaign
- **Campaigns targeted European travellers** (covering We are Europe and Open to Europe campaigns)

While these broad lines can be identified, it is not possible to systematically link all actions to a single of the above priorities or campaigns. Globally, however, the grants covered by this evaluation has funded:

- **Concept development** including development and consolidation of visual identities and other visual content for partners, and branding strategies
- **Content marketing**: i.e. the production of writing, images, video, microsites intended for consumers and development of the Visit Europe website
- **Digital marketing**: email, social media, web-based advertising, and other sponsored content
- **Influencer marketing** trips for travel-focused micro-influencers, press and other key influencers
- **Trade outreach**: familiarisation trips for tour operators and travel wholesalers and travel fairs
- **Co-branded promotional campaigns** (Co-Ops) mostly directly targeted consumers and Public private partnerships (2015 grant)[6]
- **Physical outreach** (only under the EU-China Year of Tourism – including China Lightbridge and EU-China Tourism Year Christmas Market)

The relative weight of these activities have varied over the grants. The main activities, by grant may be summarised as follows. Additional detail of the funded activities is provided in Appendix A.

Table 2 - Overview of the main lines of activity, by grant

Grant	Main lines of activity
Grant 5	• **Concept development**: Visual identity for Destination Europe and Design of outreach approaches: Designing of sustainable Public Private Partnership (PPP) for the joint promotion of Destination Europe in overseas markets • **Content and digital marketing:** New promotional materials, production of new content and revamping of VisitEurope.com (2015 grant) • **Treasures of Europe Campaign**, Public Private partnership with Expedia. Partner identified by the ETC. Matching programme of funds: ETC funds are matched by Expedia though in-kind contribution (advertising space)

[6] We have differentiated between the JPP (under the 2015 grant) and Co-branding Thematic Promotional Campaigns (Co-Ops), as we overall see these as conceptually different. As we understand the Co-Ops, these mainly generates co-financing from public or non-for-profit actors. While generation of additional funds is an important objective, we also understand that Co-Ops are to support wider objectives of (i.e. a structuring impact)

Grant 6 and 7 (EU China Tourism Year)	• **Concept development:** Design of the 2018 EU-China Tourism Year logo and website and Design of social media strategy for the year • **Content and digital marketing:** How to travel in Europe' video series for the Chinese market; 360° videos featuring European landmarks and natural heritage, and thematic videos; implementation of a Chinese digital and Social Media Marketing Strategy; Articles uploaded to the portal Visiteurope, ECTY Landing page and 6 regional travel guides; Destination Europe Advertisement Campaign on OTAs and WeChat Mini Programme • **Trade outreach:** common pavilion at five travel trade shows (incl. ITB China in 2017 and 2018) and Familiarisation trips (transnational itineraries) for Chinese tour operators and media outlets • **Influencer marketing:** KOL hosting programme (9 itineraries) ECTY Ambassador programme: 4 ECTY Ambassador trips • **Co-branded promotional campaigns** (Co-Ops): – Partners selected under calls for proposals, Mainly public partners (NTOs & DMOS), partner led and management. Focus on selected territories mostly. Co-financing by partners. – Campaigns: European world heritage journeys with EURAIL; Napoleon for Younger Chinese visiting Europe; Europe invites – Danube connects; Ningbo-Nice International Carnival; Meet Dutch and Flemish Masters by Eurail; Digital Nordic Tourism in China; Discover the hospital shopping experience in Europe and Experience Croatia, feel Slovenia • Physical outreach: China Lightbridge and EU-China Tourism Year Christmas Market)
Grant 8	• **Concept development:** Experience Europe strategy (following the H2022 strategy) – Design of the Experience Europe Brand Strategy – Experience Europe Campaign Strategy, • **Content and digital marketing - Europe invites the Curious Campaign** (with three underpinning passion points, and associated content) – Subsite on VisitEurope and curation of 25 Extraordinary Experiences of Europe, – hero video targeted towards end consumers and passion point video adaptations – Production of AMP travel stories, and paid global distribution of travel stories – Consumer communication and promotional campaign in the US • **Content and digital marketing - We are Europe campaign (in partnership with Euronews)** – Production of a TV spot & distribution (TV & digital) across the Euronews network – Campaign kit for engagement and leveraging distribution – Paid digital outreach and Development of micro-site in support of the campaign • **Trade outreach:** Three FAM trips for tour operators from North America, B2B Matchmaking event in China for European destinations and Reassurance campaign for the travel trade • **Influencer marketing:** pan-European virtual trips for international micro-influencers (under the Europe invites the Curious campaign) **Co-branded promotional campaigns,** led by the ETC and campaigns led by NTO or DMO partners. Intended to focus a selected passion point. – ETC-led campaigns: Wanderlust, Wonder Europe; Europe, Behind the Scenes; Open Up To Europe (open to Europe focused on 8 European markets) – NTO led: Slow Adventure's Hidden Heartlands; Slow Adventure in the Balkans; European Creative Cities; and Nordic Tourism in China

1.2.4 Budgetary inputs

In the 2015–2019 period a total of €9.94m was allocated as EU co-funding for the four grants subject to evaluation. This represents 75.2% of the budgeted costs, with total budgeted costs being €13.22m.

Accumulated actual costs associated with the four grants represents €12.8m. Allocated funding and total costs have increased significantly cover the study period, While total budgets in the first years ranged from €0.56m to €1.2m, budgets raised tenfold from the 2016 to the 2017 grant. For the 2019 grant, the budget remained at the level of the 2017 grant.

A headline overview of activities by grant is provided below. The table illustrate the activities undertaken, and the relative weight of these activities (in budgetary share of the grants).

Table 3 - Overview of actions undertaken, by grant year, accounting for costs only

	2015	2016	2017	2019
Subcontracted & other costs, x=<10% of total external costs; XX= 10-25 % XXX= 25-50%, XXXX= >50%)				
Concept development	X	X		X
Content for marketing	XXX	X	XX	XX
Digital and TV marketing (paid outreach)		XX	XXX	XX
Influencer marketing (incl. KOL)			XX	X
Trade outreach: fairs		XXXX	X	
Trade outreach: FAM trips			X	X
Co-branded promotional campaigns (Co-Ops)			XX (7 campaigns)	XXXX (7 campaigns)
Joint public private partnerships	XXX			
Physical outreach (Light Bridge & festival)			X	
Budget – Total (EUR)	1,199,309	565,434	5,721,672	5,733,192
EU co-funding (EUR)	899,482 (75%)	452,291 (80%)	4,291,254 (75%)	4,299,894 (75%)
% costs to research	10%	9%	2%	4%

2 Methodological approach to the study and the work carried out

2.1 Study questions

The methodology was developed taking into consideration the objectives of the study and the evaluation questions defined. The evaluation themes and questions are listed in table 4. For each of these questions, the study team designed a set of sub-questions, indicators, and judgement criteria. The evaluation matrix used as a basis for this evaluation is presented in Appendix B.

Table 4 - Overview of the evaluation questions and evaluation criteria

	Evaluation question
Effectiveness	What have been the (quantitative and qualitative) effects of EU-funded activities of the ETC to promote Europe on long haul markets and/or intra-EU tourism - have they • Improved Destination Europe's image and attractiveness? • Contributed to increase the number of targeted long-haul visitors and intra-EU travellers among ETC audience (when set as a target/KPI)?
	To what extent have external factors influenced achievements attributed to the intervention? If the intervention did not produce expected outputs or results, is there evidence of faulty design and/or management failures
Efficiency and Economy	To what extent are the costs of the intervention justified, given the results it has achieved? In particular:

	Evaluation question
	• which activities appear to have the best return on investment? • How the ETC's actions compare with similar actions of other Tourism Offices in Europe? how the European Travel Commission's actions compare with similar actions of other Tourism Offices of key competing third countries?
	To what extent has the intervention been cost effective? Could ETC have achieved better results, for instance thanks to a different timing of the intervention, a different approach to identify and control externalities and a higher critical mass?
	Is there evidence of waste, overpaying or gold-plating?
Relevance	To what extent have the objectives proven to have been appropriate for the intervention?
	To what extent is the intervention still relevant?
	Why are Tourism Offices/DMOs at different levels and private partners seeing ETC joint promotion campaigns as relevant for them? Why are some NTOs not taking part in ETC joint promotion campaigns?
Coherence	To what extent is this intervention coherent with other interventions which have similar objectives?
	To what extent is the intervention coherent with wider EU policies?
EU added value	What is the additional value resulting from the EU intervention(s), compared to what could reasonably have been expected from Member States acting at national and/or regional levels?
	What would be the most likely consequences of stopping or withdrawing the existing EU intervention?
	What is the visibility of the EU's financial support and involvement in the intervention?

2.2 Study design

The report relies upon data collected through the following methods and approaches:

- Desk research and analysis
- Interview programme of NTOs and EU level stakeholders
- Interview programme of DMOs
- Case studies
- Cost analysis and assessment

2.2.1 Desk research and analysis

This step involved the detailed mapping and analysis of the available data – as extracted from:

- EU level policy documents and implementation reports (especially as to cover questions related to relevance)
- Documentation available on the objectives, planning and implementation of the campaign and marketing programmes under the four grants subject to this evaluation
- Documentation on outputs and achievements of campaign and marketing programmes under the four grants subject to this evaluation, as well as all other relevant performance data
- Campaign and marketing outputs (for the visibility assessment

The analysis covered the approximately 300 monitoring and evaluative reports, which have been provided by the ETC, as part of the grant reporting, along with proposals, financial reports, and mapping of the marketing outputs. Additionally, a range of other sources have been reviewed and data extracted to undertake the analysis. The purpose of the analysis was:

- To understand participation patterns (NTO and DMO participation and engagement)
- To map out all performance related data of the campaigns and other marketing activity so as to identify the qualitative and quantitative effects of the different campaigns and other marketing activities
- To provide judgement of overall campaign performance (where data permits)
- To gather baseline data for the economy and efficiency analysis and to inform the visibility mapping

A non-exhaustive list of sources used to inform section 4 is provided in Appendix C.

2.2.2 *Interview programme NTOs and EU level stakeholders*

Interviews targeted the National Tourism Offices (NTOs) have been undertaken, along with interviews with selected EU level actors and the ETC.

The purpose of these interviews was to complement quantitative performance data. Interview guides were especially designed to help address questions of relevance, coherence and added value of the communication actions and of the Europe Brand and branding strategy. Attention was also given to NTOs' marketing approaches in the context of the pandemic (and post-pandemic), lessons learned and how best to ensure mutual support and synergy. In total, 30 interviews were undertaken.

The interviews covered, among others, interviews with 16 European NTOs (21 interviews), 8 EU level interviews (incl. DG GROW, several group interviews with the ETC and EU level stakeholders). The list of interviewees is provided in Appendix D.

2.2.3 *Interviews with Destination Management Organisations (DMOs)*

In addition to NTO interviews, a sample of DMOs were consulted, covering both DMOs which in the past had partnered up to EU funded actions, and a group of DMOs which had not previously partnered with the ETC.

As with the NTO interviews the purpose was to complement quantitative performance data. Interview guides were specifically designed to help address questions of relevance, coherence and added value – as well as to explore potential participation going forward, both as regards marketing in the EU and in third countries,

In total 20 interviews were undertaken. 12 interviews involved DMOs which were past ETC partners, 8 involved DMOs which had not previously participated to ETC-led actions. An overview of the number of interviews undertaken is listed below. The list of interviewees is provided in Appendix D.

2.2.4 *Cost analysis and benchmarking*

The proposed approach to cost analysis envisaged a three-level analysis, covering distribution analysis, benchmarking of unit costs with comparators (to assesses if costs globally are within the range of the typical costs); and a cost efficiency assessment based on benchmarking using a set of commonly agreed performance benchmarks for efficiency assessment (CPM, CPT, CPC, CPV, and CPC at 30, etc.). The assessment was to focus on paid digital media, considering the overall weight of digital paid B2C campaigns in the overall communication mix.

This approach was not possible. Instead, the cost efficiency exercise, has focused on distribution analysis and ROI (where data permitting). Benchmarking has been replaced with learning from others, with respect to performance measurement.

2.2.5 *Case studies*

Three case studies have been undertaken, covering three campaigns. The aim of these case studies was to collect complementary data, to that of the monitoring data, to assess the performance and results. In view of the existing data, and the nature of the campaigns (paid B2C digital campaigns) the case studies especially focused on the extent to which the campaigns generated engagement and earned mentioned,

The sample included two Co-Op campaigns, one large ETC-led (Open Up To Europe) and one small, and partner led campaign (Slow Adventure's Hidden Heartlands). Additionally, the Europe Invites the Curious, consumer communication and promotional campaign, was included, which was designed and implemented by the ETC.

2.3 Issues with the study design

The study approach, in broad terms has been implemented as intended. However, the study team encountered a number of challenges, during project execution, these are related to data availability and availability of interviewees.

2.3.1 *Data availability*

Accepting that the scope of the evaluation largely covered activities, which by the time of the start of the study, would have been completed for years, the study was heavily reliant on the existence of monitoring data. Full monitoring and reporting data was promptly made available by the ETC to the study team. The quality of this data however, varied very considerably.

Some grants had high quality performance data. Reporting for other grants was overall poor, with little performance data, beyond activity and reach data – and with available data spanning over 1000s of pages making data aggregation challenging. For a number of actions (especially digital, and out of home activities under the EU-China Year of Tourism) there was no data over and above outputs.

Further challenges arose from the fact that reporting for similar activities, were also unevenly reported, across different lines of activities and over time. This has meant that data aggregation, over the level of individual lines of actions or campaigns, in practice proved impossible. Simply there are no uniform measures at output or result level which can be considered in an aggregate format. The result has been that more time than anticipated has been necessary, for data analysis, as the approach to data mapping analysis, for each line of activity, had to be exploratory and bespoke to the data available, rather than summative in nature.

Data availability also had major implications for the initially envisaged analysis of economy and cost efficiency. Question of economy, waste, overpaying or gold-plating cannot be addressed, as unit prices cannot be identified in any of the documentation. Likewise, besides data for a single campaign (where cost per 1000 (cost per mille) is available), there is no data on any of the standard cost-metrics which could provide any indication on the extent to which there is overpayment or waste (such as CPM, CPT, CPC, CPV, and CPV at 30).

The lack of such standard metrics[7] for benchmarking with campaigns and actions from other actors, also mean that the benchmarking exercise, as originally envisaged has not been implemented. Benchmarking of cost-efficiency metrics were key to the cost efficiency assessment, as also required by the tender specifications. Instead, the study team as focused more clearly on learning from other DMOs,

2.3.2 *Interviewee programmes*

As opposed to what was originally proposed, online surveys were replaced with interview programmes during the inception phase, to maximise NTO and DMO involvement. Nevertheless, participation in the study has been low. Despite multiple requests for interviews supported by a letter from the EC explaining the objectives of the study, many DMOs and NTOs did not respond or declined participation. There were also some challenges with contact details, for selected organisations. In order to maximise participation, some interviewees were replaced. This somewhat improved participation but participation rates were lower than originally planned. Among third country NTOs, similar problems were also encountered. A possible contributing factor may have been the study period, which coincided with the period of return of tourism post-pandemic.

3 Relevance

This section addresses the evaluation questions related relevance. The terms of reference define three questions to be addressed.

- To what extent have the objectives proven to have been appropriate for the intervention?
- To what extent is the intervention still relevant?
- Why are Tourism Offices/DMOs at different levels and private partners seeing ETC joint promotion campaigns as relevant for them? Why are some NTOs not taking part in ETC joint promotion campaigns?

3.1 To what extent have the objectives proven to have been appropriate for the intervention?

- The aims, objectives and strategies underpinning the four grants have evolved over the period of the grants. The current framework has globally been appropriate.
- The Horizon 2020 marketing strategy, which is also detailed in the grant 8 proposal, is overall relevant, sufficiently focused, and coherent with NTO national strategies. Promotion of Europe under Passion Themes is closely aligned with strategies of NTOs, which see an added value for the ETC to provide a niche horizontal approach through these themes. Looking forward, however, a more explicit focus on "Europe as a sustainable tourism destination" is necessary.
- The ETC's previous strategy has been less focused – which is likely to be a contributing factor for objective setting which has been relatively more focused on deliverables and less focused on the specific results/outcomes these deliverables were to achieve.
- European Destination branding has been a priority for the grants overall, as highlighted in the 2010 Communication. Various streams of work aimed at addressing this priority. Work has been undertaken, notably in the framework of the development of the Europe invites the Curious campaign under grant 8. However, a comprehensive, long-term branding strategy, going beyond the visual identify and beyond specific campaigns, encompassing all campaign work delivered

[7] For a discussion of data availability, see also the inception report for this study.

under the grants, and more globally operating as distinctive "umbrella" brand value proposition for Destination Europe is still to materialise.

- Vision, strategic goals and underpinning specific objectives and targets, all form part of good objective setting. When considering the objectives defined in the calls and the objectives defined in the corresponding ETC proposals, there is a very close alignment. However, objectives defined in the calls and proposals mostly combine broad aims, with relatively operational objectives, related to the production of deliverables. Specific and measurable outcome objectives, (SMART objectives) are lacking, Greater attention to objective setting and tighter definitions of expected outcomes will help performance reporting and help steer campaign design.

With the aim to consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations, the ETC has since 2012 received EU co-financing in the form of ad-hoc grants for the implementation of a programme of promotional actions.

The Commission 2010 Communication *and* the objectives of the ECTY2018 set the framework for funding (alignment is addressed in section 6 Coherence*)*. Objectives for the grants are operationalised in a variety of documents, which at different levels defines objectives, and/or expected lines of actions for the four grants. Key documents are:

- The four calls issued by the European Commission to the ETC and the ETC proposals, drafted in response to the EC calls
- The ETC strategies, and specifically: *Destination Europe 2020 – a long-term strategy for Europe as a tourism destination* (published by the ETC in 2012 and guiding the first grants). and *Horizon 2022 to boldly go where Destination Europe has never gone before* (published by the ETC in 2019 and guiding the 2019 grant)

3.1.1 Objectives set for the grants

Overarching aims and expected impacts, as identified in the different documents have not – in their intention – changed radically:

- To strengthen Europe Europe's competitive image as a travel destination in long-haul markets, and
- To promote Europe as a tourism destination in oversea markets
- Ultimately, to increase (or consolidate) tourist flows to Europe from 3rd-country markets

While aims have largely remained stable over the last decade, the strategy and focus of actions have varied over grants. These changes have in part been driven by the ETC's strategic focus change with the Horizon 2022, and in part by EC requirements laid down in the calls or bilateral exchanges. EC drivers of change in particular relate to:

- The requirement to focus actions on the 2018 EU-China Tourism Year (grant 6 and 7), with a mandate by the European Commission to the ETC to play a central marketing role during that year ECTY2018)
- Increased focus on, and requirement for, partner involvement and (financial or in-kind) contributions – translated into the joint promotional platform (JPP)
- Focus on the promotion of lesser-known destinations
- Focus on certain areas, such as costal and maritime tourism (reflecting the different streams of funding, which does not only stem from DG GROW)

As from the 2017 grant, financial contribution (match funding) from partners became a requirement (previous calls accepted exclusive in-kind contribution). The requirement for financial contribution altered the JPP approach, with grant implementation becoming reliant chiefly on public and non-for-profit sector (principally NTOs and DMOs) for co-financing, implemented in the form of co-operative marketing programmes (Co-Ops),

The ETC's strategic change in focus, has furthermore implied a number of changes to the objectives, logics, and priorities of the grants.

The ETC "Horizon 2022" Strategy (guiding the grant 8 and beyond), is to build a distinctive image of Europe as a travel destination in long-haul markets. A distinctive image should attract the attention of niche audiences from across the globe and thus contribute to economic growth and development of European destinations. Increased interest in niche travel experiences contributes to balance dispersion of visitor flows (in terms of geography and season) across the continent while considering residents' aspirations for sustainable tourism growth.

The new strategy implies a transition towards a new global thematic promotional approach, creating leverage for partnerships and a digital focus. As opposed to traditional geographic segmentation, H2022 aims to place product and experience first rather than destinations. Target groups are to be identified according to their motivations and interests; segmented groups are to be targeted separately through themes. As such Destination Europe is to be promoted as a collection of meaningful experiences that connect with people's passions. Only secondly shall marking actions refer to the places in the continent where it happens. In this logic Destination Europe is to brand itself under common themes identifying the destination's strongest and most competitively appealing assets in the eyes of its prospective visitors.

The adoption of Horizon 2022 – as underpinning grant proposal 8 – had several implications for the objectives set out for the grants. These relate to:

- **Expected impact**, while the first three grants had set objectives to increase tourist flows to Europe from third-country markets, grant 8, aimed not at increasing overall tourism flows, but rather to Increase market share of Europe within key passion groups (niche markets), and to increase dispersal (place and time)
- **Specific objectives**. Initial grants (both the EC calls and the ETC proposals), largely focused specific objectives' delivery of lines of action, and not on specific outcomes or results of these actions. With grant 8 brand awareness (association with the Europe brand) and sentiment became the central objectives. Sentiment became the most prominent KPI for campaign success.
- **Costumer journey**. For the first time, grant 8 defined the touchpoints on the consumer journey, where marketing should focus (dreaming, consideration, and post-travel stages)
- **Marketing approach**. The first grants focused largely on vertical marketing (Focus on pan-European, experiences and other transnational offering). By grant 8, a thematic Horizontal marketing approach became prominent, marketing of Europe under specific themes and product around a limited set of "passion areas".
- **Segmentation**. First grants had broad target audiences (given inputs). Segmentation was based on geography and socio-demographics. With grant 8, the strategy moved to a cross-market thematic promotional approach (Profiling and segmentation based on behaviours, interests, and attitudes of niche communities of consumers), with a focus on high income Free independent travellers (FIT)
- **Branding**. Under the first 3 grants, the Destination Europe brand was defined the sum of Europe's destinations. by 2018, this changed into a multiple theme brand approach where Europe's appeal is promoted under the key themes defined. Brand Europe becomes the sum of all stories told under specific (passion driven) themes.

The following sub-section focus on the appropriateness of the objectives and strategies as laid down. The section concentrate on:

- The appropriateness and suitability of the ETC marketing strategy (with focus on Horizon 2022, – accepting that the previous strategy is outdated)
- The appropriateness of the ETC brand strategy
- The appropriateness of the objectives given good practice for objective setting

3.1.2 Appropriateness of ETC marketing strategy

Overall, it may be concluded that the approach and overarching promotional strategy presented in the H2022 Strategy (and reflected in grant 8) is in line with current destination marketing approaches of NTOs (actual or in process of development).

Targeting is seen as sufficiently focused. Focus on Free Independent and semi-independent travellers is seen as suitable also going forward. However, interviewees also highlighted that the audience focus is dependent on the target markets. Most NTOs find FIT relevant for the North American market but less so for the Chinese market.

In terms of stated objectives and consumer journey, interviewees generally felt that the focus on generating brand awareness, targeting consumers at dreaming, consideration, and post-travel stages, was suitable. Some interviewees however, also noted the need, to target audiences more actively in the (pre-) planning stage, through the marketing of cross-border itineraries/destinations.

Promotion of Europe under Passion Themes is closely aligned with strategies of NTOs. The ETC's thematic focus compares with similar actions of other Tourism offices in Europe. NTOs see an added value for the ETC to provide a niche horizontal approach through these themes.

The themes which were selected under grant 8, as a basis for branding (Slow Adventure; Creative Europe and Europe Remembers) are globally seen as having been suitable and sufficiently wide to encompass NTOs' national themes and Europe's best assets. Slow adventure overall is the theme resonating most widely. Feedback in relation to "Europe Remembers" is somewhat more mixed, with a variety in the perception of suitability given national priorities. Creative Europe is mostly seen as suitable, though one interviewee highlighted that the theme is in competition with competitors in the Chinese market (e.g., Japan and Korea). Looking forward, "health tourism" and wellbeing is an increasingly popular theme, in the aftermath of the pandemic. In this respect some interviewees see the desirability of combining heritage and health/wellbeing. Wine and/or gastronomy is also mentioned as a potential key theme going forward.

Beyond the specific theme there is generally consensus among consulted stakeholders, that a stronger focus on "Europe as a sustainable tourism destination" is necessary. Bringing about sustainable tourism and avoiding "mass tourism" are key questions to most NTOs. While sustainability is implicitly included in the themes covered by the grant, most NTOs call for more explicit references, and a more central focus on sustainable tourism. This focus would also better align the EU funded marketing actions with NTOs marketing and branding strategies.

3.1.3 The appropriateness of the ETC brand strategy

Brand establishment and development is one of the most important tasks in tourism promotion and marketing. Building a Destination Brand is about defining the vision and desired identity and image we want for the place as a tourism destination. It is also about designing and implementing the right set and mix of strategies, ideas, projects, actions, and communications in a coherent and consistent way over time to build that vision and image.

A brand must stand for something, a promise to the customer. Therefore, it is more than a logo and more than a marketing campaign. A brand should be clear, distinctive, compelling, competitive, relevant, and credible; and could be considered as the interface between the brand identity (what the brand really is) and the desired brand image (the image we want to achieve for our destination).

This image and value proposition should reflect the reality and the aspiration of the place and should be based on the unique and distinctive characteristics, attributes, and assets of a

destination. Building the destination brand is a long-term commitment that requires adopting a long-term, strategic view and effort from all key destination stakeholders over time.

3.1.3.1 The importance of a distinctive destination brand and brand positioning

Intensified globalisation leads to increased competition among destinations. All places compete to attract and retain residents, tourists and professional visitors, talented professionals, students and creative people, entrepreneurs, and clients and consumers for their products and services, and for the attention from the international media and opinion leaders. Like companies or people, destinations depend on their image/reputation.

Having a strong and positive image (brand) is the best competitive advantage a destination can have. The image people have of a place will have a "direct impact" on their attitude, predisposition and behaviour towards it, its people, products, and services; and in general, towards everything the place does, says or offers.

The concept of positioning is key when designing and managing a destination brand. Brand positioning is understood as the distinctive and relevant promise and value proposition of the destination to its target markets and segments. A destination brand is equal to its reputation with all the stakeholders. It makes certain that all marketing efforts are aligned to a common message and consistent in tone of voice in all marketing activities – from intra-Europe visitors to tourists from international markets. It ensures that when travellers hear about the destination, they have a positive association with it.

A tourist destination can be referred to as a specific place or attraction, a city, a region, a country, or a supra-national area. Europe as a tourist destination is formed by many individual European tourist destinations and experiences, at the national and the regional level. As such, the Europe destination brand should be considered a supra-national/supra-regional brand with many sub-brands, comparable to other supra-regional brands – for example Southeast Asia and Brand USA (presented in Appendix G).

The Destination Europe brand, however, is and should be much more than the sum of the individual destinations or experiences that make it up. A value proposition[8] and brand positioning[9] should be defined for Destination Europe brand that adds value and acts as an umbrella concept for all the destinations and tourism experiences within Europe.

3.1.3.2 Branding Europe as a tourist destination

The ETC, with the support and in close coordination with the EU, has been in charge of creating, building, and promoting Europe's destination brand. Branding Destination Europe has been a priority since the start of ETC grant funding, and features among the four priorities of the 2010 communication, formulated as "Consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations".

The different grants contains different strategies, initiatives, and campaigns to build Europe's Destination Brand – from grant 5 development of the "Europe" visual identity and first common "Treasures of Europe" Campaign, to the current "Europe invites the Curious" campaign, launched under grant 8.

[8] i.e. the promise to the consumers should they choose to take advantage of the offered products or service, expressed as the emotional and/or rational benefits of the offer

[9] i.e. the value proposition placed within the context of competitors, presenting the uniqueness of the European offer

3.1.3.3 Appropriateness brand strategy under 'Destination Europe 2020'

The "Destination Europe 2020" strategy published in 2012 defined destination Europe brand as "the sum of Europe's destinations".

To this end different campaigns were created and launched, including the "Treasures of Europe" campaign and other specific campaigns addressed to the US, the Chinese and other long-haul target markets. The Destination Europe 2020 marketing and promotional strategy was organised basically around demographics and geographies to define the target segments and markets. The strategy focus was on pan-European, experiences and other transnational offering, where thematic approaches covered a wide range of themes, including a bundling of destinations rather related to geography.

The branding of Europe as a tourist destination was mainly done through "communication campaigns" rather than using a proper brand design and brand building strategy, with the idea of destination Europe brand as a "collection of sustainable and high-quality tourist destinations", but without a distinctive "umbrella" brand value proposition.

3.1.3.4 Appropriateness of destination Europe brand strategy under Horizon 2022

According to the research undertaken as part of the development of the "Europe invites the Curious" Campaign,[10] Europe is perceived as a diverse destination but is generic/undifferentiated as far as its brand appeal is concerned. Europe generates more generic online searches than its competitors. Rather than a unique identity, Destination Europe is mostly characterised by its famous hotspots like Paris, Rome, and Venice.

With the aim at building a distinctive image of Europe as a travel destination the "Europe Invites the Curious" Global Campaign was launched under grant 8. The objective was to create "a unified brand strategy and story for travel and tourism across Europe", defining the values and essence of the new brand, Experience Europe, and its brand purpose around the idea of "Europe's inspiring and nurturing a spirit of curiosity" and on the visitor's perspective defining thematic products and experiences that connect with consumers' motivations, interests, values, and lifestyles. The campaign also provided guiding principles for three experience-based sub-brands.[11] For each, it defines the story and messaging, stemming from the over-arching brand purpose, positioning, and promise. It also defines the "brand voice" to be used in all campaign communications

[10] Bloom Consulting (2015). Destination Europe's digital appeal, Madrid.
[11] **Nature and Outdoors:** Connecting with Immersive Explorers – those inspired by the Slow Adventure movement – the experiences and stories are framed around human or nature powered journeys, connecting with rural communities and cultures. **Creative Cities:** Connecting with City Life Enthusiasts, those who seek unexpected experiences and stories framed around the local contemporary arts scene in small or mid-sized urban areas. **History and Ancestry:** Connects with Explorers of Cultural Identity and Roots, those who seek ancestry and heritage-related experiences and stories in connection with historical places and events

Figure 1 – "Europe invites the Curious" campaign essence



In principle, this strategy seems appropriate and relevant in terms of strengthening and consolidating Europe's competitive image as a travel destination in long-haul markets and to promote Europe as a tourism destination in overseas markets (this could work as well as within Europe). The new approach around thematic products and experiences such as nature and outdoors, creative cities and history and ancestry, is, as outlined above, also well aligned with current destination branding trends and approaches of NTOs as well as with the trends, changes, and preferences in tourism travel in the post pandemic era.

However, to evaluate the effectiveness and appropriateness of such a 'brand strategy' in terms of generating awareness, relevance and preference among key target segments and markets, specific brand objectives and KPIs should be set, and proper brand research and brand management and monitoring should be done.

Additionally, focus could be placed on defining "Europe invites the Curious" as a "global campaign" more than the "Destination Europe brand strategy" and the need to establish a proper brand management system. While Europe invites the Curious contains a brand message, it is a campaign – rather than a long-term brand strategy. A such, it has operated in parallel with other Intra-EU targeted campaigns (e.g. Open to Europe), and has, as such not appeared to federate all work undertaken under grant 8.

While out of scope of this study, it is also unclear, if and how, this "campaign" will live with and align to future campaigns, to be implemented under the ongoing grant 9, and future grants. As such, there is need for a clearer distinction between the objectives, roles and initiatives around the Destination Europe brand building strategy and the specific promotional campaigns, as the first is a more strategic and long term one while the second has a more promotional short-term objectives and duration.

There is also a need to reflect on the integration of the European brand, outside the context of EU funded actions. Currently, there is little to suggest, that the EU co-funded actions have had any impact on NTO branding or branding consistency.

3.1.4 Appropriateness of the specific objectives for the intervention, as set out in the calls

This section considers the appropriateness of the specific objectives which were set out for the four grants subject to this evaluation. Appropriateness is assessed in the view of the priorities

outlined in the tender specifications and good practice for objective setting.[12] In support of this analysis, Appendix E provides an overview of the objectives identified in the proposals and calls for the four grants.

Overall, there is a very close relationship between the call for proposals addressed to the ETC, and the corresponding proposals made by the ETC. There is nothing to suggest that objectives defined in the calls have not been addressed, or that there is a mismatch between what is being requested in terms of actions and what is being proposed.

Calls for proposals do not simply set out the main priorities, they – to varied degrees – also define the scope of action and the allocation of funds to these actions. The relatively tight definition of actions is especially noticeable in the call related to grant 5. However, subsequent calls also relatively closely define what marketing actions are to be undertaken, and not simply priorities and objectives.

It is understood that the call for proposals has been informed by consultation with the ETC, and that therefore, actions set out are a result of continuous interaction between the EC and the ETC. However, judging from the mapping of EU calls and corresponding proposals, it appears that relatively more focus has been given to defining what is to be delivered, and correspondingly less attention has been given to defining the change that these actions were to deliver. It is possible, and likely, that these results are generated from the definition included in the calls.

The generally accepted model for objective setting, highlights the need for vision, strategic goals and underpinning specific objectives. Strategic goals provides direction of where a marketing organisation aims to be in the future and how marketing actions will contribute to this aim. Strategic goals are visionary and have broad definitions (as outlined in the H2022 strategy). Specific objectives on the other hand defines exactly where an organisation wants to be in the future and by when. As such the specific objectives, operationalise the strategic goals – with one or more specific objectives underpinning each strategic goal. The acronym SMART[13] is widely used to describe what are useful and appropriately defined objectives.

If the specific objectives, as stated in the different calls and ETC proposals are assessed against SMART criteria, it may be concluded that these do not or only partially meet such criteria. Further challenges arise from the fact that the defined objectives mostly do not set clear targets or define exactly what success would look like. While KPIs are defined, links between objectives and KPIs are in several cases weak and targets and baselines – i.e. data on previous performance which could serve as a benchmark are missing. This feature has implications not just for this evaluation, but for the overall performance reporting in the framework of the four grants. Specifically:

- It is often unclear what success would look like. Where performance indicators are associated with targets, the targets are mostly set at a too low a level to provide insights into achievements against stated objectives (i.e. level of outputs or outtakes) or links between targets and objectives are not self-evident

[12] i.e. the extent to which objectives were sufficiently specific to guide choice of funded actions under the campaigns, and campaign measurement

[13] **Specific:** target a specific area for improvement; **Measurable:** quantify or at least suggest an indicator of progress; **Attainable:** assuring that an end can be achieved; **Realistic:** state what results can realistically be achieved given available resources; and **Time-related:** specify when the result(s) can be achieved

- While there is abundant documentation available on the varied activities undertaken, and their outputs, there are no attempts to undertake any analysis or aggregation of data, providing assessment of achievements and shortcomings of the different marketing programmes – and KPI competition.
- Independent data aggregation is challenging, because the approaches to performance reporting is inconsistent across actions, and over times – and the link between actions is unclear. Therefore marketing actions cannot always be analysed properly within the overall campaign but have to be analysed as individual lines of action that do not have any underlying common thread.
- It is unclear, especially for the ECTY2018, if and how objectives and KPIs, have guided the work undertaken including work with contractors, For this grant especially, stated KPIs/targets, when proposed, ultimately were not considered, and were not tracked or measured throughout the campaigns.
- The purposes of Co-Ops' objectives are not clear – over and above engaging partners and generating additional funds. Co-Op KPIs – as defined in the ETC proposals – are related only to participation and partner satisfaction. While proposal and reporting templates were developed for Co-Op partners – and objectives and KPIs were to be presented and reported on – different projects reported very differently. Moreover even "best in class projects", reported only outputs and outtakes and planning and objective setting documentation is not available for the 2019 grant Co-Ops
- Use of outcomes and impact measurement vary over grants and over activities (destination awareness, attitudes and affinity, conversion etc.). Interestingly, – while not planned in the proposal – the metrics measured under the grant 5 JPP pilot campaign are in line with good practices (campaign generated attitude changes, passenger numbers and bookings). Also, a qualitative Marketing Promotion Evaluation Study was undertaken as part of this grant pointing out weakness in the campaign design. However, such systematic measurement approaches were not replicated under subsequent grants.

The nature of performance indicators planned and actually populated are presented in Appendix F, as part of the detailed performance analysis of the grants and is not repeated here. However, it is apparent from this analysis, that greater attention to objectives and tighter definitions of expected outcomes could help performance reporting – and possibly also campaign design.

3.2 To what extent is the intervention still relevant?

- There is broad consensus on the continued need to support the branding of Destination Europe in long haul markets. Awareness of Europe's destinations and unique selling points remains inadequate. For NTOs – especially those of smaller and/or emerging destinations – promoting a European offer complementing national promotional actions is seen as valuable for developing market opportunities in long haul markets. Yet, NTOs note that while marketing of Destination Europe is key, it is unlikely to take place without EU funding.
- The ETC Horizon 2022 strategy and priorities, is globally seen as appropriate as a framework, to help addressing current challenges. There is broad consensus of the suitability of the ETC to lead marketing of Destination Europe – and consequently to continue with earmarked funds. In contrast, interviewees note the inadequacy of EU funds to deliver on the stated objectives. Enhanced budgetary envelopes are seen as necessary to deliver on the vision and strategy laid down in the Horizon 2022 strategy. Larger funds and bigger budgets for individual actions are also a likely requirement for more widespread participation.
- Covid-19 has meant changes in travel and tourism behaviour, This, including changes in NTO response, will have an impact and should be considered when defining Destination Europe branding, marketing, and promotional strategy in the short and medium term. This includes strategic consideration to if, and to what extent, joint promotion should continue to cover intra-European

promotion. While the necessity to fund intra-European promotion with EU funds during the 2020-2021 years, is recognised, views are split on the needs going forward.

3.2.1 The impact of the pandemic on tourism

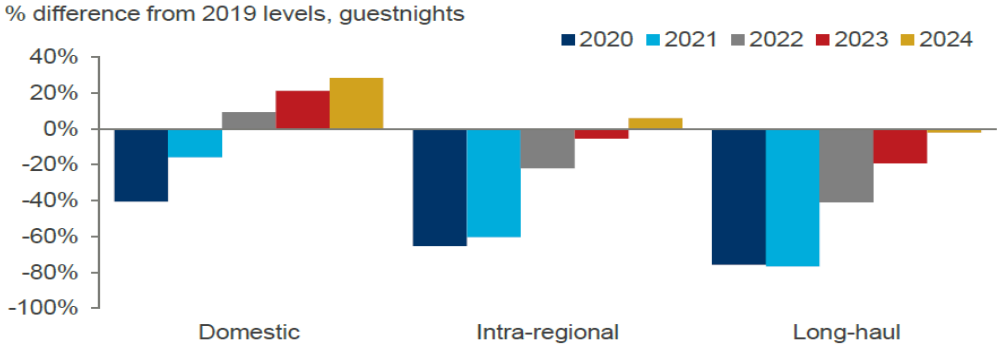
The tourism sector in Europe is a major economic activity with a significant impact on economic growth and employment. In 2019, Europe accounted for half of the world's international arrivals and 40% of international tourism receipts.[14] Of the world's top 10 destinations for international tourist arrivals in 2019, five were located in the Europe.[15]

The outbreak of the pandemic in early 2020 affected tourism activities globally. Between 2019 and 2020, the number of international tourist arrivals, dropped from 1.4 billion, to 400 million – a decrease of more than two thirds. Overall tourism's contribution to European GDP more than halved between 2019 and 2020 (from 4.3 % to 2.1% in 2020). Recovery in 2021 was slow and driven by domestic and intra-European travel. In the pandemic context travellers opted for domestic and short-haul travel instead of long-haul international trips. The share of intra-European tourist arrivals in 2020 and 2021 climbed to 85% versus the 2019 baseline of 77%.

In 2022 tourism is recovering, showing in some cases, pre-pandemic figures. Domestic travel is projected to recover fully in 2022. Intra-European travel is forecast to recover in 2023. International travel is expected to recover more gradually. International arrivals to Europe in 2022 are forecast to be 30% below 2019 volumes. Arrivals are projected to exceed 2019 levels by 2025.[16] Western Europe is forecast to be better performing than Eastern Europe's whose recovery has been pushed back to 2025 due to the ongoing Russia-Ukraine conflict. However, international arrivals to Western Europe are still projected to be 24% below the 2019 level in 2022 and +10% below 2019 volumes in 2023.

Specific factors are affecting the pace of recovery, especially in the case of Europe as a tourist destination for long-haul markets, such as the rising global inflation, an increase in Covid-19 cases in China or the war in the Ukraine, weighing on the recovery. As such, data overall showcase, a mixed picture, with both high risks and uncertainty, and positive trends in consumer intent and behaviour – especially as regards intra-European travel.

Figure 2 – Projected recovery in travel segments: domestic, intra-regional and long haul



Reference: ETC and Atout France (2022)

[14] UNWTO, 2019, International Tourism Highlights 2019 Edition
[15] France, Spain, Italy, Germany, and the UK see ETC and Atout France (2022) Restarting tourism for the better: performance of European tourism before, during & after Covid
[16] European Travel Commission EUROPEAN TOURISM: TRENDS & PROSPECTS Quarterly report (Q1/2022)

3.2.2 Changes in travel and tourist behaviour[17]

Tourism development is currently characterised by a shift in travel and a transition to a new travel paradigm – away from closed borders, towards gradual reopening and eventually full opening. But even when fully open, it may not look like it did before the pandemic.

Recent surveys and trend analysis have shown that the Covid-19 health crisis is affecting tourist behaviour. Observed changes in the short term (e.g., online sales and services increase) are expected to continue also in the medium term. Expectations for foreign and long-haul travel are likely to be lower after Covid-19. However, surveys have also revealed the willingness to travel is still there.

In the short term, when choosing a destination, tourists will be looking for low tourist density destinations with safe sanitary conditions. Tourists will prefer destinations with outdoor activities and contact with nature, far from big cities, with price not being the main criterion for choosing a destination.

Domestic tourism has significantly increased during the pandemic and in the current reopening phase. This has also been the case in Europe, even though there is still a willingness to travel abroad for a holiday. Outside the home country, destinations less affected by Covid-19 are preferred.

Changes in the duration of trips are also expected, either towards shorter trips or trips of the same duration but split into several smaller trips. Household budgets for holiday travel are also likely to be lower due to global inflation, travel price increases, global economic instability, and uncertainty. In the post-pandemic era, it will be important to understand changes in consumer travel preferences, habits, and priorities. Some of the emerging travel trends important for Destination Europe's branding and marketing to consider are:

Health and Safety Health, safety and hygiene measures will be a top priority for travellers worldwide after the pandemic, even over price. There will be a growing consumer interest in improving and maintaining good physical and mental health and an increase in wellbeing, providing an opportunity to offer more personalised wellness experiences.

Outdoor Post-pandemic consumers will be looking for outdoor and secondary destinations, showing an increasing interest in nature, rural areas, mountains, coast, and less-crowded beach tourist destinations that offer a wide variety of outdoor activities.

Authenticity Travellers will be seeking local and authentic experiences, venturing into leisure activities that have meaning for them and engaging with the destination and its people, in a meaningful way.

Travel booking Due to uncertain travel restrictions, travellers are looking for flexible booking options, which go hand in hand with shorter booking deadlines.

Digitisation The pandemic has increased the pace of technology adoption in the travel industry, allowing companies to accelerate their customer and supply chain interactions and internal operations through digitisation.

Domestic tourism Domestic tourism has grown significantly. The rise in domestic travel and ongoing demand for staycations have been impressive worldwide – also in Europe.

[17] Based on recent research on the 'Impact of the Pandemic on Travel Behavior' by Kai Partale and Juan Carlos Belloso (2022).

Sustainability of travel and of tourist destinations will be an increasing priority in the post-pandemic era, a trend already visible pre-pandemic. The trend toward sustainability will remain in the long term with more consumers intending to travel more responsibly and more sustainably. Examples of eco-tourism and other type of sustainable travel experiences will rise.

3.2.3 NTOs and the pandemic response

National Tourism Offices, play a key role in country branding and destination marketing in Europe. While no consolidated data is available on actual marketing spend, it may be noted, that national public marketing spend largely outweighs the resources available for ETC led EU co-funded marketing activities. Illustratively, the French NTO, Atout France, operates with an annual budget of €56.3m (2021).[18] The Visit Denmark 2020 budget represents some €25.5m.[19] Overall, a clear majority of NTOs operates with annual budgets above €10m.[20]

NTOs pandemic response has been characterised by a variety of features, some of which, have a bearing on this study. These include:[21]

- A change in weight in the marketing focus, with enhanced financial efforts allocated to European markets, greater emphasis on neighbouring markets, shift in marketing targeting so as to stimulate demand in domestic market – with activities in long-haul markets restrained in line with changes in demand and travel patterns
- Roll out of "inspirational campaigns" and reassurance campaigns with the aim to encourage later stage visiting
- Enhanced focus on environmentally friendly/sustainable tourism

Overall, the pandemic had a large impact on the daily operations of NTOs, mostly referring to the steep decline of visitors from long-haul markets and the damaged relations with the tourism industry. A main priority for many NTOs has therefore been to strengthen and rebuild partnerships and trying to convince people to travel again.

Additionally, NTOs from Eastern Europe have experienced significant decreases in visitors resulting from the Ukraine-Russia conflict, either because they do not welcome Russian visitors anymore, or because visitors from other countries think it is unsafe. Some NTOs have included mitigating the impact of the war as their main priority.

In this context, fewer resources have been allocated to marketing in long haul markets, with more focus on B2B activity and less B2C marketing.

There is nothing to suggest that the pandemic generated decreased financial resource availability for NTOs. While budgets available for NTO action evolved considerably in the 2010-2020 period,[22] available data rather suggests that public funding continued or increased due to the Covid-19 pandemic impacts. There is likewise nothing to suggest NTOs have closed their offices in long haul markets during the pandemic. While there is some evidence that some NTOs have closed offices, happened before the pandemic.

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[18] Atout France, Rapport d'activité 2021

[19] Visit Denmark Årsberetning 2020

[20] THE CHANGING TOURISM ENVIRONMENT AND ITS IMPACT ON THE WORK OF NTOs: THE STAKEHOLDERS PERSPECTIVE Summary reports on primary research relating to the evolution of NTOs, past, present, and future

[21] See HANDBOOK ON COVID-19 RECOVERY STRATEGIES FOR NATIONAL TOURISM ORGANISATIONS

[22] THE CHANGING TOURISM ENVIRONMENT AND ITS IMPACT ON THE WORK OF NTOs: THE STAKEHOLDERS PERSPECTIVE Summary reports on primary research relating to the evolution of NTOs, past, present, and future

3.2.4 *Rationale for continued funding of promotional activities*

Overall, there is across interviewees, mostly broad consensus as regards to continued need to support the Branding of Destination Europe in long haul markets. Beyond the imminent challenges which are arising from decreased visitor inflow from long haul markets in the aftermath of the pandemic; visitor decreases resulting from the war in Ukraine, and more broadly the importance of tourism for European economy and employment, interviewees pinpoint to other new and continued challenges and issues – which can only – or best be addressed through common approaches:

- **Awareness of Europe's destinations** and unique selling points is inadequate. Traveller awareness of European destinations and the diversity of destinations within, in long haul markets is considered low. General tourism searches in long haul markets, still dominate – suggesting a need for better European profiling. Distinctive image and profile of Europe require further - and continued – work if Europe is to compete with third market destination. In this context, branding of Europe under a common "Destination Europe" umbrella is mostly seen as an important overlayer and complement to national efforts.
- **Many smaller destinations**. For NTOs of smaller and emerging destinations especially, promoting a European offer – in complement to national promotional actions – is seen as key for develop market opportunities and providing an offer for long haul visitors. Visitors from long haul markets will visit more than one European countries in one trip, and many visitors plan multi-country travel,[23] Views, however, vary, on the most suitable approach. Some favour trans-European thematic campaigns, while others see value in promoting certain geographical transnational locations rather than broader European inspirational campaigns. Finally, some NTOs from large destinations consider European campaigns less relevant, primarily because they feel their own brand is strong enough to attract long-haul market visitors
- **A new global context require new communication**. Some interviewees highlight, the need to promote, not just of the offer, but also wider communication on European values outside Europe ultimately fostering the image of a free, stable, and attractive region.

Yet, NTOs note that while marketing of Destination Europe is key, it is unlikely to take place without funding. Co-funding opportunities provide an incentive to collaborate on campaigns and other marketing actions. It also allows for the covering of the (additional) costs, associated with collaboration. Without funding, interviewees note, there is no incentive but also no management will, accepting that national NTO funds are "earmarked" to marketing of a specific country.

There is broad consensus of the suitability of the ETC to lead marketing of Destination Europe – and consequently to continue earmarked funds. ETC plays an important role in bringing tourism activities together, in connecting different countries, in helping to develop a common European brand and in supporting co-design and implementation. The appropriateness of the ETC as a lead organisation to drive marketing activities in long haul markets is widely recognised, also among other European organisations.

As outlined, the ETC Horizon 2022 strategy and priorities are globally seen as appropriate as a framework, to help to address current challenges. Moreover, while not within the scope of the

[23] According to the ETC (2018) Tracking multi-destination travel in Europe from long-haul source markets 60% of visitors from the long-haul markets of China, Japan, India, and the USA will combine two or more countries in Europe with 30% visiting nine cities or more in one trip,

study, ETC co-funding, is also seen has having significant additional benefits, in terms of supporting the industry through research and interest representation.

In contrast, several interviewees note the inadequacy of EU funds to deliver on stated objectives. Enhanced budgetary envelopes are seen as necessary to deliver on the vision and strategy laid down in the Horizon 2022 strategy. Larger funds and bigger budgets for individual actions are also a likely requirement for more widespread participation.

This finding is also in line with the policy priorities of the Tourism Manifesto which was drawn up by an alliance of European public and private organisations, covering the whole tourism value chain.[24] Among the priorities for which further EU action called for, funding of "joint promotion" plays a prominent role.

In contrast, there is no consensus view on the extent to which such joint promotion should continue to cover intra-European promotion. While the necessity to fund intra-European promotion with EU funds during the 2020-2021 years, is recognised, views are split on the need going forward. Some NTOs mention the continued benefits of collaboration in the intra-European market. Others note the extraordinary circumstances in 2020-2021, the current recovery and that NTOs within Europe are competitors rather than potential collaboration partners.

In any event, the expected continuous growth intra-European and domestic tourism in the post-pandemic and the likely continued negative impact on long-haul travelling raised the question of if additional focus on promoting "intra-European" tourism should be placed in the marketing and promotional strategy for the coming years.

3.3 Why are Tourism Offices/DMOs at different levels and private partners seeing ETC joint promotion campaigns as relevant for them? Why are some NTOs not taking part in ETC joint promotion campaigns?

The intent to actively involve NTOs and DMOs in the implementation of collaborative campaigns, is assessed positively, Co-Ops as a marketing approach, is overall seen as suitable. EU co-funding provides a clear incentive. However, when considering actual number of applications under grant 7 and under grant 8 (implemented pre-pandemic), total number of applications has been low. In contrast, ETC-led Co-Ops, implemented under grant 8 generated widespread participation.

There is no unique response to the two models. Some NTOs and DMOs, consider that the original model, of partner led design and implementation is preferable. Key advantages include the opportunity to market a transnational offer while focusing on a geographically limited territory. Some NTOs also note that this model is the only model they are likely to participate in going forward. Other NTOs and DMOs consider the "pay in model", with campaigns being led by the ETC, as more desirable. Reasons are the relatively lower participation costs, but especially, lack of resources which constitute a challenge to the "partner led Co-Op model".

Overall, participation is positively associated to alignment of Co-Op priorities to the NTO strategy; pre-existing contacts or collaboration with other NTOs/DMOs, low entry and for NTOs mostly also smaller destinations. Barriers relate notably to lack of awareness (especially DMOs), lack of existing partnerships, and short-term planning, and lack of funding or resources. There are additional structural challenges especially for DMOs.

Analysis of NTO and DMO participation needs to account for the fact that activities have increasingly been designed with active participation in mind. Activities under grant 5 did not

[24] See tourismmanifesto.eu

centre on the participation of NTOs and DMOs. Actions under grant 6, offered NTO and DMO the opportunity to participate in B2B fairs but did not involve co-design of campaigns and other activities. Co-design only became prominent with the 2017 grant, reflecting the introduction of collaborative marketing campaigns (Co-Ops) and the opportunity for "buy-in" into ETC-led campaigns.

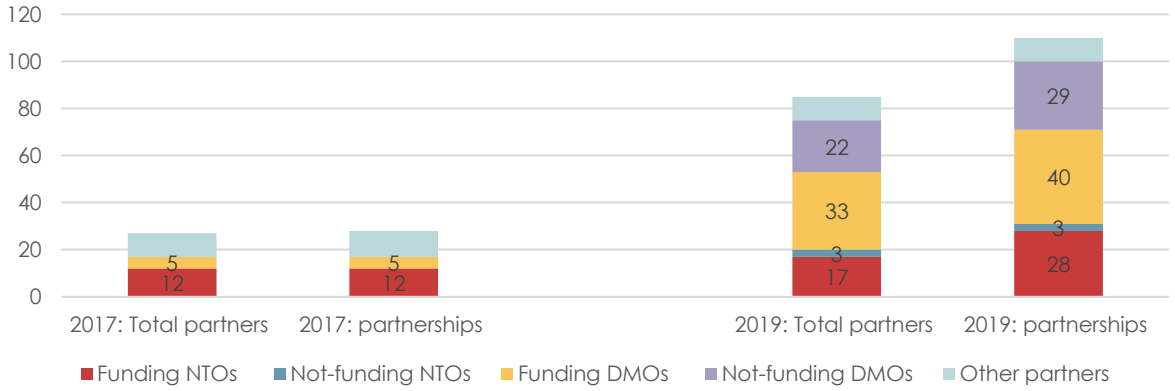
3.3.1 *Participation in ETC joint promotion campaigns: trends, and development*

Overall, it may be concluded that a wide number of European NTOs and DMOs have engaged with the ETC joint promotion campaigns under grants 7 and 8.

In total 105 different entities partnered under the two grants. The partnerships involved 23 NTOs. 63 DMOs and 20 other partners. The latter were mostly providers of travel services (rail and air, hotels and other accommodation, and retail). About one in four partners have participated in more than one campaign. In total 117 partnerships were created with DMOs and NTOs under all campaigns. Half (12) of the recurrent participants are NTOs. Most DMOs and NTOs stem from the EU (90% and 83% respectively).

There has been a large jump in the number of Co-Op partnership campaigns created between the 2017 and the 2019 grants, suggesting their likely relevance. The largest shift is that of DMO participation. Only five DMOs participated under grant 7. For grant 8 grant the number was 56. When counting co-financing partners, numbers are somewhat lower, but remain nevertheless high. In total 50 DMOs and NTOs participated in Co-Ops under the 2019 grant.

Figure 3 – DMO and NTO participation in Co-Ops: 2017 and 2019



Source: analysis of ETC reporting data

3.3.2 *What motivates participation – evidence from the monitoring data*

Data suggests that what has motivated increased participation is chiefly related to the change in the nature of Co-Ops. Grant 7 exclusively involved Co-Ops which were conceptualised and implemented by applicants. There was a change in approach with grant 8. Following the start of the pandemic (and drop out of some of the DMOs/NTOS from Co-Op proposals submitted pre-pandemic), some campaigns were designed and led by the ETC, with partner contribution/funding. Others were led by the NTOs following the model first tested under grant 7.

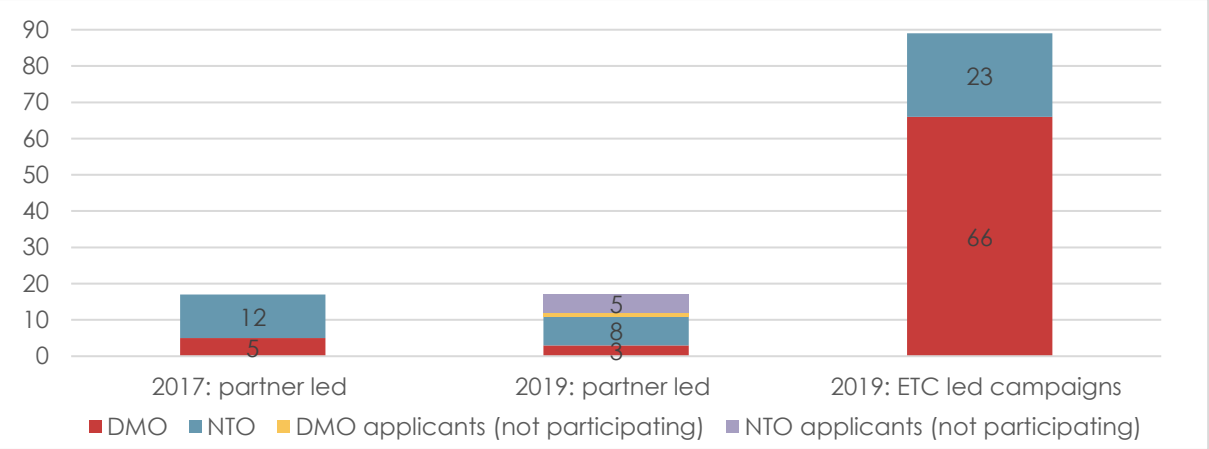
When considering the outcomes of the calls which have been implemented under grant 7 and under grant 8 (implemented pre-pandemic) to generate (partnership led) Co-Ops, total number of applications has been relatively low. The number of applications increased from grant 7 to grant 8. However, this is due to a high number of applications from airlines. The number of DMO and NTO applicants stagnated, suggesting that there are challenges with the

implementation of the partnership-led Co-Op model. . In total 16 NTOs and 1 DMO partnered the in the 18 proposals for Co-Ops under grant 8, against 17 NTO/DMO participants under the grant 7.[25]

This is in stark contrast to the ETC-led Co-Ops which generated widespread participation. Overall, the three ETC-led Co-Ops (Europe Behind the Scenes; Open Up To Europe and Wanderlust), generated an accumulated 89 partnerships with NTOs and DMOs, involving 61 partners.

As further discussed below, the pandemic played a motivating role for participation, as did the opportunity to participate in campaigns targeting European markets. However, data does not suggest that the change in geographical focus, so as also to cover Europe (the Open to Europe Campaign) was a chief driver of enhanced participation. While 14 DMOs and NTOs did exclusively participate in the Open to Europe campaign, the majority of the NTOs and DMOs (37) that did participate in ETC-led activities, participated in one or more of the other Co-Ops which targeted long haul markets.

Figure 4 – Partnerships generated (including redrawing partners), by type of campaign organised



Source: analysis of ETC reporting data

3.3.3 *Who participate*

It is apparent that there are differences in the patterns of participation in Co-Ops across DMOs and NTOs in Europe. Some NTOs (and DMOs) have taken part in several campaigns, others, in few or none. The overarching trends are that:

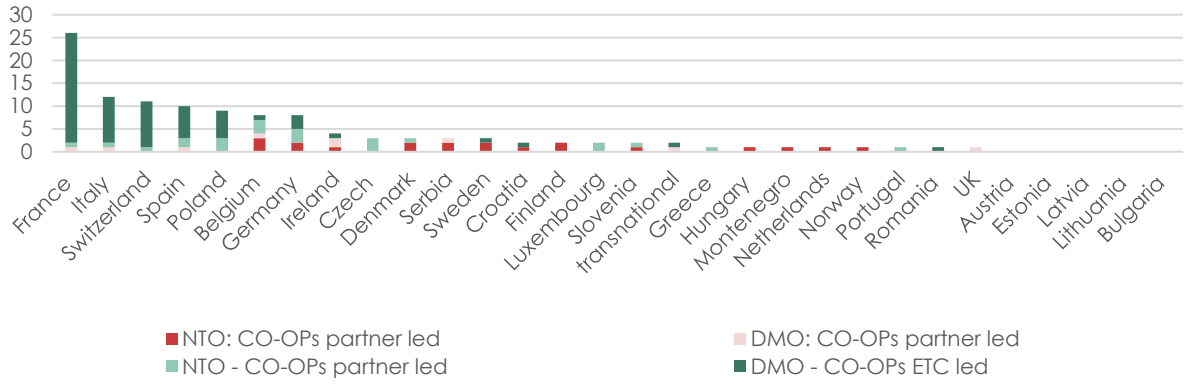
- There is more participation from DMOs (or NTOs) which stem from countries with a high number of international tourist arrivals,[26] and low(er) participation from Central and Eastern European countries. This data suggest that collaborative campaigns are less salient for the latter group, especially when they take the form of partner-led Co-Ops. With the exception of the western Balkans (Slovenia, Serbia, and Croatia), there is very little involvement in partner led Co-Ops in Central and Eastern Europe.

[25] While the number of applications for Co-Ops increased under the 2019 grant, 11 of 17 proposals originated from the private sector (chiefly airlines, hotels, and non-for-profit organisations). 11 NTOs and DMOs (8+3) participated to partner led Co-Op under the 2019 grant. In addiiton, 5 other NTOs (HU, PL, Wallonia, LU and NO) and one DMO (Grand Est, FR) took part in applications – but redrew or were not selected

[26] See for example Atout France and ETC (2022) Restarting tourism for the better: performance of European tourism before, during & after covid

- While DMOs frequently participate, participation appears concentrated from larger countries and other countries with high levels of regionalisation (Belgium and Switzerland). that DMOs from other countries may tend to operate through NTOs rather than participating individually.
- DMO participation appears heavily concentrated on ETC-led activities (in terms of costs and management burden). Few DMOs participate individually to partner led Co-Ops and when they do, they tend to do this in collaboration with NTOs from their own Member State.
- Recurrent participation to partner led Co-Ops, is concentrated in a relatively limited number of countries – including most notably: Belgium (especially Visit Flanders); Germany; Denmark, Sweden, Finland, and Serbia. While DMOs from large countries (France, Italy, Spain, Poland), in numeric terms, are among the most represented in the collaborative campaigns, their low participation in collaborative campaigns lead by partners is noticeable, as is the lack of involvement of NTOs from these countries, in such campaigns.
- A final notable feature in participation patterns is very modest involvement of NTOs and DMOs From Greece, Portugal, Netherlands, and Austria – despite being in 2019, among the top ten EU destinations in terms of nights spent within the markets in which campaigns were running in the 2018–2021 period (i.e. Canada, USA, and China).[27]

Figure 5 – Participation (measured in partnerships), by country, by type of campaign organised



Source: analysis of ETC reporting data

A somewhat similar participation pattern can be identified for other non "Co-Op" marketing actions. While full data on participation is not available across all activities, data is available on selected activities.[28] Analysis of this data confirms an overall wide engagement of partners across Europe. However, it also confirms that engagement varies, over time and across activities. A central feature is that ETC through other actions engages NTOs other than those participating in ETC joint promotion campaigns. Especially a range of Central and Eastern European NTOs were involved in "other marketing activities", but not in Co-Ops. These also involved the NTOs of Portugal and Austria, which likewise did not engage in any joint promotion campaigns.

[27] Eurostat contractors' analysis of Nights spent at tourist accommodation establishments by country/world region of residence of the tourist (USA, Canada, and China)

[28] Including the C Ctrip content marketing campaign which was run the in the framework of the EU China year (2017 grant); the digital content marketing programme under the 2019 grant: European stories network and fairs organised within the framework of the EU China Year of tourism (and partially fairs organised under the 2019 grant)

3.3.4 *What motivates participation*

The intent to actively involve NTOs and DMOs in the implementation of collaborative campaigns, is assessed positively by consulted DMOs and NTOs, and continuation, is welcome. Co-Ops as a marketing approach – combining both "ETC-led" and "partner-led" Co-Ops is overall seen as suitable.

Interviews showcase that there is not a unique response to the two models. Some NTOs (about 1/3 of those consulted), consider that the original model, of partner led design and implementation is (clearly) preferable. Key advantages include the opportunity to market a transnational offer focusing on a geographical limited territory – while designing a campaign which clearly fits within the marketing strategy of the participating NTOs/DMOs. Some NTOs also note that this model is the only model, which (outside a pandemic context) is likely for them to participate in. In this respect, some interviewees note that co-funding approval by NTO management is unlikely if the NTO has not been involved in the design and strategy development.

Other NTOs and DMOs (majority) consider the "pay in model" with campaigns being led by the ETC, as more desirable. Reasons are the lower participation costs, as the lack of resources constitutes a challenge to the "partner led Co-Op model". Therefore a model allowing for "buy in" into a campaign designed and executed by a third party (rather than self-management and design) is seen as more feasible – as it minimises management burden. In that respect, the ETC partnership led model, is desirable, also outside of a pandemic context.

Differences in terms of likely participation patterns should be noted. Southern-European, popular, consolidated touristic destinations more frequently have a preference for partner-led activities as do north/western destinations. Smaller, emerging Eastern-European destinations tend to be relatively more enthusiastic about ETC-led Co-Ops.

Additional factors explaining and motivating participation into the different Co-Ops relate to:

- **Relevance**, alignment between the strategy underpinning the Co-Ops (Horizon 2022) and the marketing strategy markets set by the NTO. This criterion is key for all NTOs. Half also note the importance of target market alignment
- **Pre-existing contacts**. (partner led) Co-Ops, chiefly results from pre-existing contacts, where funding provided the opportunity for development of collaboration
- **Low costs** the ETC-led Co-Op partnership model involved a significantly lower entrance fee than for partner led Co-Ops – and several partners (32 partnerships/25 NTO and DMO partners) participated without any co-funding. Cost is especially important for DMO participation, though 1/3 of NTOs also note the importance of low costs. The latter tends to NTOs from emerging destinations
- **Testing the ground** (especially ETC-led Co-Ops) ETC action allow NTOs and DMOs to "test the grounds" for new market. This factor appear not just for Co-Ops, but also more widely for other activities into which DMOs and NTOs can buy in (e.g. B2B fairs and other events, influencer marketing and press events)
- **Co-funding.** Co- Co-funding is seen both as a requirement and a motivator for participation. A 50% co-funding rate is widely considered suitable, and in line with standards use elsewhere, both in third countries (e.g. USA), and among European NTOs which uses the same approach to engage national DMOs or private partners. While a marginally higher co-funding rate would still maintain interest, significantly higher requirements for co-funding would likely go in pair with decreased participation
- **The pandemic**. Some interviewees note that the pandemic created level of "urgency of action", requiring NTOs to reach out, so as to help mitigating the impact of the pandemic

and reassure consumers. This also means that some NTOs took part in activities which they otherwise would not have participated in

Going forward there is across NTOs and DMOs interest in the portfolio of actions undertaken under grants 7 and 8 – with the following observations:

- Overall B2C marketing campaigns (social/digital media), generate most widespread enthusiasm among NTOs. This is much less the case among DMOs, which principally would be interested in such actions if they would be targeting the European market
- Familiarisation trips and press activities are seen as attractive by about half of the NTOs consulted, but about 1 in 4 to 1/3 consider these as of overall low attractiveness
- NTOs see B2B meetings as less attractive – though some NTOs (the Mediterranean destinations), considered these attractive in long haul markets (especially Asia, subject to the market opening up). About half showed no interest in such activities as their NTOs already have a strong network. There is generally more interest in B2B actions among DMOs
- Overall, there is a strong preference among the DMOs noticeable for intra-European tourism marketing campaigns as opposed to the long-haul market counterpart

3.3.5 Obstacles towards participation

While there is a clear interest among a majority of consulted NTOs in participating to collaborative marketing actions, there are also obstacles which hamper participation. These obstacles may be resumed as follows:

- **Insufficient visibility**. not all those consulted were aware of the opportunities provided under EU funding. Awareness was generally high among NTOs. In contrast, many of the non-participating DMOs – and especially those where the NTO was not participating – were not aware of the Co-Ops. There is therefore a need for more consistent promotional activities
- **Planning**. Many NTOs highlight that there is insufficient time for ensuring effective participation in activities. Calls are seen to come too late/with too short notice to effectively ensure NTOs co-funding. ETC budgets are allocated, long in advance, and time is necessary to ensure match funding within NTOs (both to allow resource allocation and to convince management to free resources). This in turn would call for:
  - Longer EC grant periods and/or
  - Forward planning with the ETC, so that early warnings can be circulated among prospective participants to EU-co-funded Co-Ops
- **Inadequate resources**. while there is motivation to participate, several NTOs note that there is not adequate resources internally to take on the management of Co-Ops

Additionally, for partner-led Co-Ops, partnerships are a challenge. As outlined above, (partner-led) Co-Ops, chiefly result from pre-existing contacts. They have not – or only modestly – generated new partnerships. While the ETC has helped facilitating the development of partnerships (especially under grant 8, in the context of the pandemic), a more structured support to partnership facilitation would be necessary, to support wider development of new partnerships. This facilitation must come at a very early stage – before the calls. Additionally, if the grants are to provide equivalent benefits to all Member States, there is a need to ensure eligibility of non-EU members (e.g. the UK) and facilitation of their participation.

With regard to DMO participation, there are, judging from the consultations, some opportunities increase their involvement with earlier warning and more comprehensive promotion of the opportunities. For some of the "non-participating" DMOs consulted it was apparent that they would have joined marketing efforts, had they simply been aware.

However, there are "natural" limits to DMO participation, which stems from factors outside the control of the EU grants and the ETC's work, and which are difficult, if not impossible to address. These "obstacles" relate one or more of the following:

- The focus of DMOs marketing activities, with EU co-funded activities often being outside of target markets of the DMOs' strategies (which typically will be within immediate geographical vicinity or at least within Europe). Participation in intra-European marketing actions would in that respect make more sense for DMOs
- National collaboration structures, where work in long haul markets usually is done with the NTO and not independently/with direct engagement from the DMOs. Many DMOs will only consider participating in ETC actions if this is organised via their NTO. If the NTO neglects to participate, the DMO tends to feel uncomfortable (and/or does not know how) to participate in ETC activities. An NTO that is willing to participate in ETC actions and has the incentive to include regional partners seems therefore to be an important factor for the participation of DMOs
- Lack of HR and/or financial capacity. DMOs are often not geared towards participation in large international tourism marketing activities. If co-funding is to be provided, absolute levels of co-funding need to be low

Additionally, there are trends in DMOs participation data. These trends suggest that DMOs, stemming from countries with stronger regionalised structures (BE, IT and ES) may be more inclined to participate in ETC-led actions. Therefore, should DMO participation be a priority area, there may be benefits in concentrating outreach activities on these.

With regard to other aspects of the Co-Ops it should be noted that the Co-Op model implemented under grant 8 does not appear to be an unreasonable burden (in terms of planning, implementation, and reporting). The grant 7 management model was heavier, with the process itself regarded as difficult, bureaucratically (difficult to report and receive the funds). There is anecdotal evidence to suggest, that the grant 7 model, at least in one case discouraged further participation. The change implementation approach for Co-Ops, where the ETC takes on tendering processes is seen as an improvement from grant 7 to grant 8.

Finally, it should be observed that the ETC – or the underpinning Horizon 2022 strategy – is not, in itself an obstacle to NTO participation. Most of non-grant receiving NTOs had participated in other ETC activities and were enthusiastic about their collaboration within the ETC guidance and structure. Activities include participation in the working groups on marketing, research and on strategy, the yearly conference etc. Likewise, non-participating NTOs note the alignment between the Horizon 2022 strategy (niche marketing focus, alignment of passion themes, target audiences etc.) and the general suitability of this strategy. Among the interviewees only one organisation (a transnational organisation) saw decreasing alignment and overlap of visions with the ETC, and therefore stopped financial contribution, and collaboration all together.

Finally, several interviewees indicate that larger co-funding allocations would operate as a motivating factor, should they participate in the future.

4 Effectiveness

This section addresses the evaluation questions related to effectiveness. Two questions to be addressed under this theme:

- What have been the effects of EU-funded activities of the ETC to promote Europe on long-haul markets and/or intra-EU tourism

- Have they improved Destination Europe's image and attractiveness?
- Have they contributed to increase the number of targeted long-haul visitors and intra-EU travellers among ETC audience (when set as a target/KPI)?

- To what extent have external factors influenced achievements attributed to the intervention? If the intervention did not produce expected outputs or results, is there evidence of faulty design or management failures

4.1 What have been the effects of EU-funded activities of the ETC to promote Europe on long haul markets and/or intra-EU tourism?

This section provides a headline presentation and analysis of the performance of the marketing campaigns and other programmes implemented under the four grants. In line with the tender specification the assessment considers outputs and results of the marketing activities, while also considering (where data permits) expected outcomes and impacts (effects on Destination Europe's image and attractiveness and generated increases the number long-haul visitors and intra-)EU travellers among the targeted audience).

The presentation builds on a fuller analysis, included in Appendix F, detailing all effect measurement available. Appendix F also presents the basis for the analysis, along with a presentation of the challenges which are associated with the monitoring data which is available. As discussed under section 4.2, the analysis of performance is hampered use of different KPIs and metrics over time and over campaigns, varied levels of outcome focus, and a reporting system only partially focused on performance reporting. For these reasons, the section report on the effects, as measured, and at the level of the campaigns or line of activity.

4.1.1 Effects of the campaigns and other outreach activities organised under grant 5

Two major lines of marketing actions were organised under the grant 5

- The Treasures of Europe campaign implemented as a joint partnership (JPP) with Expedia, aiming increase the visibility of "Destination Europe" and ultimately increase the number of long-haul visitors
- The development of European content and experiences – showcasing Europe as a unique destination - on the "visiteurope.com" portal and connected social media. The action intended to enhance chiefly increase traffic to (and position) of the website and generate a follower group on social media

The campaign was the largest marketing activity (€290K in subcontracted costs or 65% of all marketing related sub-contracted costs). Content development on the "visiteurope.com" portal and associated social media had a budget of €180K (or 34% of marketing related sub-contracted costs). Overall performance of the grant 5 marketing actions may be summarised as follows.

The Treasures of Europe Campaign

- The Treasures of Europe campaign can overall be considered as successful, as a test of public private partnership, with expected match funding (in kind contribution) by the private sector. The campaign performed well with respect to its visual design, appeal, and enjoyment. A small positive effect on consumer attitude towards Europe tourism attributes was also observed.
- The campaign did not perform well when considering consumers intent to travel or actual consumer behaviour online (number of passengers, bookings and average spend), and did, as such, not deliver on the expected booking impact (conversion).

Visit Europe and associated social media

- Paid social media outreach, generated relatively high engagement on the social media channels, as a positive indicator of campaign interest. Paid outreach, however, only modestly generated the

desired results. The click through rate to the visit Europe website was low, and social media outreach only generated a modest social media follower group.

4.1.1.1 Effects of the Treasure of Europe Campaign

The Treasure of Europe Campaign was intended to increase the visibility of "Destination Europe" in the United States and promote inspirational pan-European experiences through online marketing campaigns. It also had partnership aims, intending to build strategic partnership with key players from the private tourism industry, increase joint public-private investments in promoting "Destination Europe" and to design a joint promotional platform. Ensuring the joint presence of the European Commission and ETC at key trade events was also a stated aim of the work package – though not implemented. In terms of performance indicators, the proposal defined the following:

- Year to Year increase in number of web sessions and web users from USA (+20% for both sessions and users)
- Total number of annual pageviews form USA (target: 1,200,000)
- Impact on travel sentiment and travel demand from USA (no target defined)

In practice campaign reporting did not report on these indicators. No data was provided on the reach of the campaign, and no website statistics were made available in the framework of the 2015 grant reports. In contrast, outcome data (passengers increases in booking, number of passengers and nights spend) and was collected by Expedia, and awareness and attitude data was collected (polling).

Overall the campaign was assessed very positively in terms of attractiveness. The campaign reached an average likeability score of 69%, considerably higher than average US campaigns (41%).[29] The campaign performed strongly on both interest and enjoyment, with +50% of respondents indicating that the campaign images, information on European regions, quiz and European maps appealed to them. The campaign in particular stood out for images and regional information, with a likeability score around 70%, on those two indicators. Its quiz was seen as engaging, fun and interesting, with particular praise for quiz questions related to history, gastronomy, and culture.

Its links to the ETC Visit Europe campaign website was weak. The website (along with the add banner), were the least appreciated[30] with qualitative research suggesting that most quiz visitors exited the Visit Europe site once they had completed the quiz.

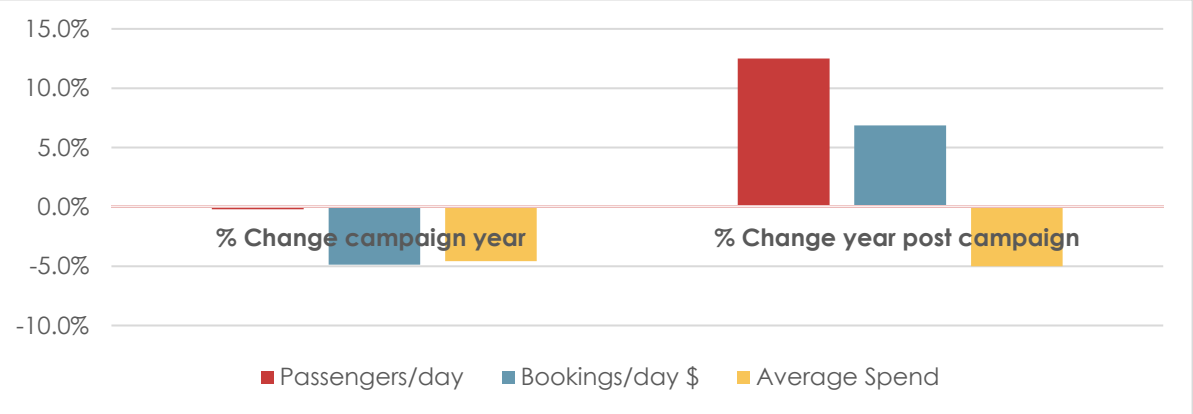
Polling was undertaken among a sample of consumers having been exposed to the campaign and was compared to a set of consumers who had not been exposed to the campaign to measure effects on consumer attitudes towards European tourism attributes. This data shows a positive net difference on 8 out of the 19 statements, related to the campaign[31] confirming the campaign appeal. However, positive differences were small (5% or below on individual indicators) and not statistically significant.[32]

Overall the campaign did not have any measurable impact on consumer behaviour. Consumer patterns were monitored on Expedia, using three metrics: passengers, bookings and

[29] Ipsos Mori, Marketing Promotion Evaluation Study (Annex to the 2015 Grant report to the ETC)
[30] On 8 categories : images, info on regions, quiz, prize draw, maps, deals, website, and ad banner.
[31] Interesting history and heritage, landscape, new and different things to discover, beautiful coastal areas, romantic destination and easy to travel.
[32] Ipsos Connect (2016) European Travel Commission Marketing Promotion Evaluation

average spend. In the campaign year, the number of passengers decreased 0.2%, and average bookings and spend decreased with about 5%.[33] These results resonate with the research undertaken among consumers which concluded that that there was no net campaign impact on consumers' intention to visit Europe.[34]

Figure 6 – consumer behaviour campaign and post campaign



Source: ETC, Expedia campaign reporting

4.1.1.2 Effects of the content on the "visiteurope.com" portal and associated social media outreach

Development of content on the "visiteurope.com" portal and associated social media outreach was intended to enhance the image of Europe as a unique and diverse destination; increase traffic to (and position) "visiteurope.com" as the primary source of information about Destination Europe, promote inspirational pan-European content on social media, generate followers, and further develop the deliverables of previous grant periods.

With the objectives being activity focused the action had the following KPIs:

- Year to Year increase in number of web sessions and web users (+15% for both)
- Total number of annual page views (target: 2,000,000)
- Improved user experience of "visiteurope.com"

In practice, the campaign reporting did not provide data to populate these indicators. instead only data on digital and social media metrics were provided. Digital and social media outreach generated a total of some 46 million impressions. The lion share of the campaign reach was generated via Google ads (96%), paid social media outreach generated 1.67 million impressions, and 89,600 video views. Digital advertising generated 35,600 video views.

Engagement with paid digital and social media outreach was measured on two indicators: post engagement and website clicks. Average engagement on social media was relatively high (0.094). In contrast, the campaign performed fairly as regards click though and accumulated clicks (CTR: 0.009 for social media and 0.0048 for digital advertising – and an accumulated 134K clicks).

Consequently, if it is assumed that the marketing action was intended to operate as a key driver generating website visits, it may be concluded that the campaign was modestly

[33] Expedia Visit Europe: Phase final report
[34] As measured as the net difference that the campaign

effective. Similarly, the campaign performed modestly if measured against the aim to generate a sustained follower group for continuous exposure. In total, the number of Facebook followers increased with some 4,760 followers. For Instagram the number was 4,235.

4.1.2 Effects of the campaigns and other outreach activities organised under grant 6 and grant 7 (EU-China Tourism Year)

Grant 6 and grant 7 supported the delivery of the EU-China Tourism Year (ECTY), a year which had as stated objectives to promote lesser-known destinations, improve travel and tourism experiences, providing opportunities to increase economic cooperation, and to create incentives to make quick progress on EU-China visa facilitation and air connectivity.[35] Within this context, the goals of grants 6 and 7 were formulated as:

- Increase awareness of lesser-known European travel destinations in China
- Build strategic partnerships with key players in the Chinese outbound travel market
- Provide a premium business platform for market development for European destinations and SMEs
- Educate Chinese travel trade and consumers about pan-European experiences and thematic transnational travel (grant 7)
- Encourage positive media coverage of European destinations and generate PR; and
- Drive engagement of target audiences with pan-European travel content

Grant 6 was intended to support the preparation of the year. Marketing actions under grant 7 ran during the year. The following actions were delivered under grant 6:

- Creation and implementation of a social media strategy targeting the Chinese market
- Delivery of animated videos providing practical information for Chinese travellers
- Participation of Destination Europe in trade events (European stand and matchmaking)

Under grant 7, 10 major lines of actions involving both online and offline marketing were undertaken were organised in continuation the previous grant:

- B2B: Pan-European Mega-FAM Trip, and China Travel Trade Shows Programme
- B2C: Digital Content Marketing Programme; Digital Advertising Programme, Social Media Programme and Destination Europe Advertisement Campaign on OTAs
- Media and KOL Hosting Programme
- Physical outreach: ECTY Christmas Market and the EU-China Light Bridge
- Co-ops with NTOs, DMOs and other partners across Europe

In monetary terms, the EU-China Year consumed about half of the total budget allocated to the four grants subject to this evaluation. When considering the marketing costs (i.e. disregarding staff costs, overheads, and research costs), nearly half of the budget was allocated to the digital content, digital and social media advertising programmes (46%). The second largest share of funding was allocated to the 7 Co-Ops (22%), followed by media and KOL hosting programme (12%) and the China Travel Trade Shows Programmes (10%). Other actions represented 8% of marketing costs.

Few KPIs were defined for the two grants. Six digital and social media KPIs were defined for grant 6, mostly focusing on Year over Year (YoY) increases in the page views, followers, and visitors to the ETC's accounts. These were complemented with a target for co-exhibitors at the

[35] European Travel Commission (2019) Chinese Performance Report. 2018 EU-China Tourism Year summary report.

EIB China Destination Europe stand (target of 20) and a target for pre-scheduled appointments (20 per co-exhibitor). Grant 7 included more indicators, but these were activity and output focused, and many were not populated.

Since most lines of action were targeted at China and the Chinese social media ecosystem, the ETC had to rely on Chinese subcontractors to deliver campaigns. From a monitoring perspective, Chinese subcontractors are of varying quality. Chinese tools for monitoring are lacking compared to European or American counterparts and the deliverables are of lower quality, making it more difficult to evaluate the impact.

Outcomes and impacts of the ECTY related grants

When measured in inbound travel from China (2018 and 2019) ECTY 2018 has been highly successful. There has been a very significant jump, in both market shares and growth rates from 2018 to 2019. Large YoY increases are observed especially in 2019, and, for some destinations in the fourth trimester of 2018. Effects are especially large for Southern, Northern, and to a smaller extent Eastern Europe, Changes in outbound travel from China to Western Europe only increased marginally.

Considering the fact that the focus of the ETC activities ECTY2018 was to promote lesser-known destinations and the pattern in YoY increases in inbound travel, it may be concluded that the ETC-led marketing actions have assisted in generating this change. The actual contribution of ETC activities – and the effectiveness of the activities in this respect – however, cannot be assessed as there is no digital conversation tracking, no tracking of advertising recall, attitudes and no booking or search tracking for the funded campaigns. ETC marketing activities formed part of a large number of marketing campaigns and other actions, which ran in the year. As such attribution is challenging.

Outputs and results of the marketing activities

To the extent that data is available it suggests that programmes and campaigns have delivered on – and often exceed – the stated targets:

- Digital and social media outreach programmes met or exceeded their stated targets. However, several indicators did not have a target, some indicators were set in % with absolute low increases, and focus overall is on (paid) impressions, and comparably little on engagement, and expected behaviour. The most successful campaign was Europe in the Move as there was a prize draw for an Apple Watch. Advertisement Campaigns on OTAs appear to have performed strongly, but data quality is poor
- Actions targeting businesses and other intermediaries (B2B events, FAM trips) performed well on satisfaction, and likelihood to recommend. Targets for Chinese operators, however, were often not met
- Media and KOL Hosting Programme performed strongly. KOL campaign met its goals, generating over 400 pieces of content with an estimated 111 million impressions. The ambassadors programme generated. 14 million post views with 440k engagements, uploaded videos were viewed over 8 million time
- Eight Co-Ops with were launched under grant 7. The grant proposal KPIs focused on the number of Co-Ops, number of EU partners and satisfaction rate of the partners, not on the performance of the campaigns. Where campaign KPIs were set they were nearly always met or exceeded. However, reporting was in most cases focused on reach – which in most instances were paid, and thus chiefly reliant on the scale of the budget allocated to digital marketing or to other forms of paid promotion. Due to the heavy reliance on output monitoring, it is not possible to make an assessment of the actual campaign performance. However, among the campaigns, the Nordic Tourism Co-Op and the Discover the hospitality shopping experience in Europe show better performance than other campaigns. Europe Napoleon for Younger Chinese visiting Europe campaign stands out as underperforming. Some activities under the Ningbo-Nice international Carnival, appeared irrelevant
- Physical events (EU-China Light Bridge and ECTY Christmas Market) were not associated with specific objectives and little reporting was provided

4.1.2.1 Impacts of the EU China year

Monitoring and measurement does not include measurement of the aggregate performance and impact of the actions the EU funded marketing actions led by the ETC. As a part of the reporting, however, monitoring of Chinese arrivals was conducted to estimate the impact of the year. There has been an overall YoY increase of 5.1% during the 2018 EU-China Tourism Year. All European regions reported positive growth during the year with the fastest growing being Central and Eastern Europe (CEE) posting a double-digit increase of +10.6%. Growth, however, is slower than overall increases in Chinese arrivals worldwide, suggesting, therefore, a modest impact on total YoY changes, but a more significant impact in CEE (and within Europe but outside of the EU).

Within these main results there are, however, large differences, between countries and over time. Performance was strong around the 2018 Chinese New Year period, with especially CEE countries (Slovakia, Lithuania, Poland, and Croatia) and southern European countries Malta, Italy, Spain, Portugal, and Finland, experiencing double digit percentage increases in incoming visitors. In contrast, top destinations (UK, France, and Germany) experienced either stagnation (France, and Germany) or decreases in visits (UK, -14.6%). Stronger performance was also noted in the last trimester of 2018 with again stronger performance in the CEE and in southern Europe.

Table 5 – YoY changes of air arrivals from China to worldwide vs. the EU and EU sub-regions, periodic performances

	Jan-April 2018	May-Aug 2018	Sep-Dec 2018	2018
World wide	6.90%	6.90%	5.90%	6.50%
EU	7.20%	2.20%	7.90%	5.10%
Northern Europe	1.70%	-0.60%	9.60%	2.70%
Western Europe	8.90%	4.60%	6.20%	6.10%
Central and Eastern Europe	7.20%	10.30%	13.50%	10.60%
Southern Europe	10.20%	30.00%	7.20%	5.20%
ETC members	12.2%	4.7%	10.7%	-
Other European countries	22.10%	19.80%	25.70%	22.20%

Source: European Travel Commission (2019) Chinese Performance Report. 2018 EU-China Tourism Year summary report

If trend data is considered on changes in outbound travel from China to European destinations, it confirms overall that the likely impact of the EU-China year of Tourism in 2018 was small if one looks at the accumulated impact on inbound travel to the EU – but high for emerging destinations.

In contrast, the data suggests that there has been a very significant jump, measured in both market shares and growth rates from 2018 to 2019, a result which can be linked to the ECTY – and associated to ETC marketing activities. Increases are very significant overall, with large increases in global market shares (+2.7 percent of total) and total outbound travel from China. Effects are especially large for Southern and Northern Europe; changes in outbound travel to Western Europe have increased only marginally.

If 2018 and 2019 data are analysed together, it thus suggests overall that inbound travel, as measured from 2017, increased significantly, but also that these increases chiefly benefited CEE countries, Northern and Southern European Countries. Data also suggest higher benefits among ETC member countries than among non-member countries.

As the focus of the ECTY2018 was to promote lesser-known destinations tailored to Chinese travellers' specific preferences and the noticeable increase in Chinese arrivals, there are indications to say the activities overall have been successful – contributing to overall increases in Chinese arrivals – and especially contributing to increases in visitors outside the European top destinations (i.e. the UK, France, and Germany). However, other factors, are likely to have contributed to this effect, including NTOs own/independent marketing activities, the increased number of flights (new corridors), lower baseline numbers in Northern and Southern Europe, as well as the effects of organising the year (and consequently the (political) endorsement of outbound travel to Europe. Within this context, the following sub-sections consider the performance of the different marketing programmes.

Table 6 – YoY changes in inbound travel from China, YoY increases. the EU and EU sub-regions, and global European market share

	2014	2015	2016	2017	2018	2019
Global market share	13.0%	13.9%	12.2%	14.4%	14.3%	17.0%
Travel to Europe	Base	24%	-3%	21%	11%	27%
Travel to the EU					4%	41%
Northern Europe	Base	41%	31%	23%	9%	57%
Western Europe	Base	27%	-17%	8%	7%	1%
Southern Europe	Base	14%	-15%	22%	41%	257%
Central and Eastern Europe	Base	20%	18%	37%	10%	4%

Analysis based on ETC reports European tourism: trends & prospects Quarterly reports (Q3), extracts from the reports covering the period 2014–2020

4.1.2.2 Digital and social media advertising programmes

Over grant 6 and 7 the ETC ran a very large number of relatively small digital and social media outreach programmes, under a set of varied headlines. The main result of the analysis of the performance data related to these campaigns is that they overall met or exceeded their stated targets. However, several indicators did not have a target, some indicators were only populated in percentage increases, and readability of data is hampered by a reporting setup, spanning 1000s of pages. It is therefore not possible to undertake a comprehensive performance assessment.

Chinese Social Media Marketing Strategy (grant 6). The aim of the Social Media strategy under grant 6 was focused on 4 different general routes a) Increase Fan Base 2) Create New Content 3) maintain Engagement with Fans and 4) Run New Campaigns. In terms of performance indications, the ETC proposal defined the following – some of which are not measurable:[36]

- YoY followers' growth and YoY unique visitors' growth on Sina Weibo +10%
- YoY pageviews on Sina Weibo +10%
- YoY followers' growth on WeChat +40%; and YoY post views on WeChat +10%

There is a social media strategy outlined in the agreement with DragonTrail (the subcontractor chosen), however, there were no KPIs included in the contract. Only vague descriptions such as "increase fan base via persistent posting of good content" were included in the agreement.

Reporting was overall inconsistent and poor with a focus on visuals of posts. Reach, engagement, and follower increases of the different campaigns is reported, but not set against

[36] KPIs such as unique visitor growth or pageviews on Sina Weibo

any targets. According to the final report, all KPIs set have been met with an increase of followers of ~28% on Weibo and ~88% on WeChat. Absolute increases, in contrast, were relatively small. The most successful campaign was Europe in the Move as there was a prize draw for an Apple Watch. Growth in followers is also associated with prize draw campaigns and that appears to have worked quite well.

How to travel in Europe video series, under grant 6. The aim of this line of action was to create four 90-second animated videos which provide practical information and tips for Chinese travel operators and FITs with the clips being published on different platforms. In terms of indicators the initial proposal and the final report have different KPIs. Initially the focus was 3k views on YouKu. Final KPIs were set at 200k views across all platforms and channels.

According to the final report the campaign outperformed the set goals, with videos generating a total number of ~822k views – four times the set targets. The videos, however, had modest engagement (~1.7k). Video views were better on Tencent compared with Miaopai as the latter are linked to promotions on other social media channels. Videos posted on ETC own Weibo channel did not perform well (just 60k views and very low engagement). Nor did they perform well on ETC own WeChat channel.

The use of KOL Weibo was associated with higher reach – ~1.7 million impressions of the posts for the videos. KOL WeChat had over ~3.5 million performance, suggesting that the use of KOL drove reach and engagement, as the ETC own channels have not been adequately developed.

Digital Advertising Programmes (grant 7) The aim of the Programme was to develop a new WeChat Miniprogramme to be promoted and integrated with existing ETC channels and structures. The programme included information about tourism in the EU and tools for visitors.

Measurable goals set out in the proposal included ~6 million impressions, 0.4% CTR, >45% bounce rate, However, Miniprogramme do not have metrics such as CTR or bounce rates. Consequently, the performance of the Miniprogramme was not monitored, only the promotional activities surrounding it.

The WeChat Miniprogramme was promoted across various channels Weibo/WeChat/Ad Banner. Promotion focused on General Functions of Miniprogramme. The promotion generated over 14 million impressions on Weibo compared with 23k in WeChat. Engagement rates on Weibo performed better compared with WeChat. It is unclear why. The Ad Banner promotion reported only a total number of ~50k clicks for 5 days, but there were no pre-set KPIs or agreed upon CTR or targets. (unclear budget, CTR, targeting).

Digital Content Marketing Programme (grant 7) The aim was to create new How to Travel in Europe and thematic videos (including a 360 degrees video) together with new content in the form of travel articles for specific topics including maritime tourism and national heritage to be published across different channels and platforms including WeChat and Weibo. Measurable goals set out in the proposal included 8 thematic videos (2 maritime/2 natural heritage), 8 360-degree VR videos (2 maritime/2 natural heritage), 52 travel articles (13 maritime/13 natural heritage), 4 How to Travel in Europe videos with 500,000 views, and travel guide (no target specified).

KPIs for content generation were met with reporting referring to 56 new website travel articles (those are labelled as website travel articles, however links provided refer to WeChat) and 100 WeChat articles. No data on the traffic to those articles is provided and while content is generated, it is unclear which articles (if any) drove traffic or engagement to the ETC channels.

Travel guides for EU, Piemonte, Veneto, Finland, Catalunya, and Tuscany were published and promoted on Mafengwo. According to the reporting provided by Mafengwo, the EU Travel guide was most viewed and saved with Finland performing better than other destinations. Though, it cannot be determined if that is because of the different marketing or overall quality of the travel guide. As part of the campaign the travel guides were promoted within the Mafengwo platform with good performance of the campaigns: ~16 million impressions with 330k clicks (average CTR ~2%). However there is no report on the data for Finland.

Social Media Campaign (grant 7). The aim of the activity was to improve account management of the ETC's official Weibo and WeChat channels by including posting new content to promote pan-European trips and specific country trips, attracting new followers and interacting with NTOs' accounts. As part of the activities the idea was to create new strategies and synergies with KOLs and Ambassadors, thus creating a cross-promotion project for Weibo and WeChat.

Measurable goals included in the proposal – 800k impressions, number of participants (not set), 8,000 social media follower base increase, 1 big-scope campaign with maritime and national heritage as a topic, and 1 middle-scope campaign with maritime tourism as a topic. Those KPIs were revised when speaking to the Chinese subcontractor. The big campaign – 150k impressions, 600 fan growth, 5,000 participants, 300 engagements; and the middle-scope campaign – 400k impressions, 1,500 fan growth, 1,200 participants, 1,200 engagements.

To the extent that data is available it suggests that results achieved outperformed set KPIs. There was a significant growth of fans on the ETC's own channels. The ETC worked with one KOL for the big campaign and 4 KOLs for the medium campaign, and promoted across various platforms – Weibo, WeChat, Xiaohongshu, Meitu, and Ctrip. For the big-scope campaign, WeChat appeared to be most successful when cooperating with KOLs in terms of engagement. The medium-scope campaign focused on Weibo.

It is unclear how KOLs were chosen, but they have various performances. The KOLs were proposed by the Chinese subcontractor, but there was no definition on the criteria for choosing those KOLs in particular. For example, Account @桃子与司康 (Peaches and Scones) has the least number of impressions but almost the same engagement rate as accounts with much higher number of followers, suggesting that he/she was a more suitable KOL to drive the conversation.

Performance of the campaigns was highly dependent on the prize draw gift. Choice of channel is important, as a closed ecosystem like WeChat has exposure only to the audience there as opposed to the wider public like on Weibo.

4.1.2.3 Travel Trade Outreach Programme (grant 6 and 7)

The travel trade outreach was organised under both grant 6 and grant 7. It constituted a major action under grant 6 (European Stand at the EIB 2017 fair). Participation with a common European stand at four additional fairs was organised under grant 7.

In terms of participation, fairs largely met KPIs. 137 co-exhibitors were registered in total. One in five of the total co-exhibitors were NTOs (26) one in four (37) were DMOs. 73% registered to the EIB 2017 or EIB 2028 fair. Other fairs generated much less interest.

Reported satisfaction amongst co-exhibitors was high for most fairs with average satisfaction of 85% or above for three of five fairs. Satisfaction was lower for CITM (76%) and GTEF Macao only reached a satisfaction score of 25%. There is no information on the possible reasons for this low score.

In total, nearly 2,000 pre-scheduled meetings with hosted buyers from Chinese operators were organised across the fairs, with half taking place during EIB 2017. When considering the targets set for pre-scheduled meetings, the fairs however, underperformed, with about 25% to 30%. EIB 2017 was overall marginally more successful (average of 16 pre-scheduled meetings per co-exhibitor) and COTTM the least (average of 9 meetings). PR activities were globally most successful at EIB 2018, generating a total of 145 press items. In total 221 press items were reported but there is not data for all fairs. There is no reported buyers' feedback, and hence no information on the extent to which potential buyers were likely to include the destination in their itineraries.

4.1.2.4 Destination Europe Advertisement Campaigns on OTAs (grant 7)

The aim was to create 3 EU destination pavilions (landing pages) on 3 Chinese Online Tour Operators (Ctrip, Tuniu and Tongcheng). The landing pages offered different information about Europe as a tourism destination as well as specific products (tours). Measurable goals included: 17 million banner impressions, 38k landing page visitors and 1.5% YoY increase in bookings. However, the campaign was not designed in such a way to measure increase in campaign related bookings (it is unclear which bookings in particular are measured)

The data in the reports is difficult to map. Ctrips reporting is of the best quality (others are unclear). Ctrip data suggests that the advertising campaigns overall met and exceeded their targets. Targets for impressions and landing page visitors, were exceeded. Advertising performed averagely with a CTR of ~0.41% (the average for a Ctrip banner is 0.2%–0.8%). The pavilion generated 1.4 million pageviews from 1.1 unique visitors.

Data made available on bookings suggests strong campaign performance with high growth rate in bookings. Spain, Catalunya, and Serbia had the highest YoY increases in PAX, but all monitored destinations, featured in the pavilions enjoyed high YoY increases in PAX and Hotel Room night Quantity. There are, however, no comparative data from other destinations. and growth rate data is provided at country and not at destination level.

The data, which is made available for the Tunio campaign, suggests YoY growth rate of 30% from the 10 featured destinations. Data, however, appear suspicious with close to identical YoY growth rates for each of the featured destinations (ranging from 29% to 31%).

4.1.2.5 Media and KOL Hosting Programme (grant 7)

The Media and KOL hosting programme included two main activities: KOL and ambassador programmes. The aim of the activity was to identify Ambassadors and KOLs to promote the image of Destination Europe by inviting them on trips/activities related to Europe and creating content around those trips. Measurable goals included in the proposal – 400k Ambassador Programme video views, 8,000 KOL posts and article impressions/views (which is quite low).

KOL Hosting programme. 10 KOLs with over 30 million followers (over various platforms) were chosen. The campaign met its goals by generating over 400 pieces of content with an estimated ~111 million impressions. However, there were large differences in KOL performance. Some have much higher reach (number of impressions) with a fewer number of posts (for example Jinpeng Zhang 15 posts ~1 million views vs Yun Cai 41 posts ~250k views) Jiajia Zhu and Huayun Yu both visited Slovenia and Croatia, but Jiajia's performance is better. It is unclear how those were chosen.

Ambassadors programme Celebrity Ambassadors was chosen as part of the campaign. Data on the performance of the outputs of these actions were not systematically made available, with reporting focusing on screenshots of videos and photos. Performance reporting quality and readability is very low. However, data from Bazaar (the Chinese media partners)

suggested that performance was very good. According to this data 14 million post views with 440k engagement was generated. The uploaded videos were viewed over 8 million times on various channels and the campaign ranked in the Top 3 Hot Topics on Weibo.

4.1.2.6 FAM trips (grant 7)

Three familiarisation trips in the EU with Chinese tour operators were organised as part of grant 7, covering in total 41 destinations and 20 Transnational itineraries. Two FAMs were organised in 2018 with one being postponed to 2019.

When measured against the stated targets, the Mega FAM trips performed well, even if participation targets were not met. FAMs performed strongly on satisfaction and likelihood to include destinations in new itineraries – with a satisfaction <90%, and with 95% indicating their intent to include visited destinations in new itineraries. Whether destinations were included in their itineraries was not measured. 183 Chinese operators participated against a target of 240 (target completion rate of 76%). Additionally 9 media representatives participated.

4.1.2.7 Physical outreach – EU-China Light Bridge and ECTY Christmas Market

EU-China Light Bridge The aim was to promote the activity of lighting up EU and Chinese landmarks in the same colour to promote the EU-China Tourism Year. As part of the campaign 10 second commercials were shown 60 times on CCTV 9. However, since there were no pre-set KPIs or guidance on how to measure the effect of the commercials little was reported. The only data referred to is the accumulated gross impressions from the commercials (18.9 million OTS) and registered visitors (25,000).

ECTY Christmas Market the Christmas market took place in Chengdu (Sichuan) at the end of November 2018. It was a 3-day consumer-focused promotional activity to showcase European Christmas traditions. 5 countries and one region were covered (BG. CZ, DK, DE, Serbia, and Destination Danube) showcasing European Christmas traditions. Digital features included the development of a WeChat mini programme, including an interactive map of the venue (Visitors could go to each booth and scan a code to get a virtual visa from the given destination); a Christmas calendar (each day online visitors could open a door and see the information inside) and a virtual postcard taking the online visitor to a virtual postcard from the given destination or company, which could be personalised and sent to friends on WeChat.

No KPIs appear to have been set for the activity; in this context, reporting was limited to footfall (total of 25K visitors) and downloads of the mini-programme (12K). Despite aiming to drive traffic from offline to online, no information on the engagement with the mini programme was reported.

4.1.2.8 Co-branded promotional campaigns

Eight thematic transnational promotional campaigns with 28 public and private partner organisations from different EU states were launched. This can be considered as a trial for such Co-Ops as it is the first time this was implemented. The scope of the Co-Ops was vastly different making comparison impossible. In addition, the grant proposal KPIs focused on the number of Co-Ops, number of EU partners and satisfaction rate of the partners, not on the performance of the implemented campaigns. Thus, this was not structured in a way that could have been analysed.

Within the context, performance reporting was in most cases focused on digital impressions generated (paid or KOL generated), in some cases engagement with paid content and/or generated clicks, number of earned press items, and, where physical events took place, number of participants). Only one of the Co-Ops provided further information. Given these

limitations, it is not possible to make a horizontal assessment of the overall performance of the Co-Ops. However, the following findings should be noted:

- Objective setting and associated definitions of KPIs are overall inadequately defined, and reporting in 6 of 8 cases on stated KPI is inadequate (for detail see Appendix X). The ETC tried to standardise the proposal and reporting templates; however, not enough guidance was given to the different partners when filling in the necessary documentation. When filling in reports and proposals, deliverables, outputs and KPIs would be confused and used interchangeably, thus affecting the quality of the reporting and the overall structure
- Where KPIs were set they were nearly always met or exceeded. This finding applies for both targets related to reach and engagement. However, many KPIs set related to impressions, or other forms of reach only – which in most instances were paid, and thus chiefly reliant on the scale of the budget allocated to digital marketing or to other forms of paid promotion
- Due to the heavy reliance on output monitoring, assessment of the campaign performance is not possible. However, among the campaigns, the Nordic Tourism Co-Op and the Discover the hospitality shopping experience in Europe appeared to show better performance than the other campaigns. This, in part may be due to an overall better quality of reporting
- The Europe Napoleon for Younger Chinese visiting Europe (NYCE) campaign stands out as clearly underperforming, with low reach figures and without any evidence that any of the undertaken actions has generated any substantive results
- Two of eight campaigns developed software (Flemish Dutch Masters, the Europe Napoleon for Younger Chinese visiting Europe. Apps were either not reported on, or performed very modestly, when considering use/downloads
- Activities overall appeared relevant to contribute to the overarching aims of the EU-China Tourism Year. However, advertising in Times Square NY for Ningbo-Nice international Carnival, appeared irrelevant. Also the aim to reconduct the event in Ningbo city over a several years' span, appear somewhat less fitted to the objectives of the ETC grant

Table 7 – Performance overview Co-Ops under the EU-China year of tourism

Co-Op	Campaign scope	Campaign performance
Nordic Tourism	Campaign to promote the 4 Scandinavian countries as a roundtrip destination. Digital Content marketing Display, video, and SM advertising.	• 4,677.4 million impressions generated across platforms. 832K clicks generated (average click rate of 1.7%) • All channels including the demand side platform, Baidu, WeChat and Zhihu performed adequately and met all KPIs with some surpassing them significantly (for example the Baidu feed advertising had twice as many impressions as set). • As part of the campaign KPIs for digital marketing were refined by the Chinese subcontractor in line with industry standards.
Ningbo-Nice Festival	Organisation of the first international European carnival of Ningbo, on the base of Nice Carnival, with European street artists from EU countries.	• KPIs relating to attendance and earned press and digital media coverage. Reported performance related only to participation, press and digital mentions: 151K participants at the carnival, 72 earned press items, 7493 digital mentions (earned), with about 5K being on Weibo • The campaign was featured on the national CCTV1 news (reported 100 million views) and advertised in Times Square NY as well as other CCTV channels. It reportedly performed better than previous actions of similar nature • Goals defined are not outcome focused.
Napoleon for Younger Chinese visiting Europe (NYCE)	Activities involving the development of an app. Participation in B2B fairs; social media outreach, seminars, and	General/weak objective definition. No KPIs defined. Weak performance data provided: • 30 press articles • <300 new trade contacts during fair and road show, but quality of contacts unclear. As part of the campaign and the attendance of trade shows, a Cube AR App was developed, but no data on performance was provided. This was

Co-Op	Campaign scope	Campaign performance
	trade shows. Not all activities appear to have been implemented.	supposed to be downloaded by fair attendees, but people did not wish to download it at the event. No other data on performance of the app • WeChat Account gathered only 160 followers with spikes only around the events. The provided impression and engagement data (posts) show poor performance
European World Heritage Journeys with EURAIL	Main activities: press conference, KOL fam trip, H5 mobile landing page, and offline exhibition on "Dutch Flemish Masters". Campaign in part operating through KOL (6).	• Poor presentation of campaign logic. Reporting of poor quality. KPIs defined as reach of 6–10 million with 100k engagement and booking conversion to Eurail 25k (but conversion not monitored) • Performance above set KPIs. 61 million impressions reported. Paid marketing campaign generated 3.8 million impressions, and some 101K clicks. CT was high on some activities (3.21%) but low on other (<0.10%) • KOL trips generated 51.1 million impressions, with a reported read of 11.4 million. 6 QYER travel notes earned 749,060 hits and 2,102 engagements. No other information on engagement • As part of the campaign an interactive H5 game was developed featuring +20UNESCO itineraries which was to be picked up past the campaign end date. A reach of 200K reported but there is no data on the extent to which the game has been consulted by anybody
Discover the hospitality shopping experience in Europe	Interactive HTML5 page showcasing seven urban destinations (London, Paris, Frankfurt, Munich, Milan, Barcelona, and Madrid) and multiple aspects of European lifestyle – and associated digital marketing.	• Social media advertising campaign on reached 14.2 MM impressions. The HTML5 page received 270,000 pageviews • Number of visitors to Value Retail and Melia website increased by +36% during the campaign period. 47% of the traffic generated by display and social media campaigns • +25% new followers in Value Retail WeChat account. + 17,95% fans growth rate in Melia WeChat account • +16% growth in sales and Value Retail footfall during the campaign period compared to previous year/. +20% booking orders for Melia during the campaign period compared with previous year • Co-op campaigns with the best set KPIs defined in proposal
Experience Croatia, Feel Slovenia	Target a B2B audience and high-value travellers searching for special themed activities in high-end magazines	• Actions proposed within the campaign (advertorials, webinars, and workshops/online training) were delivered • However those were only followed up with circulation figures for print advertorials and participation figures to online events (673) and number participants gained the "Experience Croatia, Feel Slovenia" Travel Specialist certificate resulting from the online training (302) • Very general objectives/expected outcomes
Europe Invites – Danube Connects	KPIs set in the proposal focus on establishing relationships with trade representatives and including Destination Danube in tour operator programmes.	Very general objectives outlined in the proposal. If assessed against stated targets objectives were met: • 314 trade representatives engaged during a series of workshops in Beijing, Guangzhou, and Shanghai. 20 MoU were signed with tour operators focusing on commitment to further promote Danube and include it in their offers for next year • The goal of 100 media publications was met (120 were published in total) • One of the actions within the campaigned involved a Sina Weibo KOL stage, No data provided for the campaign, just a breakdown for 3 destination countries • A Danube pavilion was created on Ctrip with performance in line with other Ctrip campaigns – over 180k unique visitors and banner ads performing averagely (CTR 0.35%), However no booking data was provided
Flemish Dutch Masters	Activities included principally: offline presentations pitched to different media; Exhibition of Masters in Beijing; a KOL FAM	• Estimated total impressions across all channels reported to be 49 million (based on impressions in QYER that includes media buys), QYERs featured landing page was responsible for ~22 million (109% more than expected) with 230k unique visitors. KOL generated: 45 posts, 6 travel notes on QYER. Video reported to generate 600K views. +5k visitors to expo

Co-Op	Campaign scope	Campaign performance
	Trip. dedicated H5 game	• PR outreach (offline presentations): 88 earned clippings generated on (24 official media articles (WeChat/Weibo)3 print coverage, 61 website articles). Eurail tickets sold were to be measured but were not reported • The dedicated H5 game was created and promoted on WeChat, but that reached only 2.4k unique users even after being promoted by two travel and lifestyle influencers

Source: European Travel Commission (2019) reports from Co-Ops under grant 7

4.1.3 Effects of the campaigns and other outreach activities organised under grant 8

Grant 8 was to deliver a global destination marketing campaign aimed at building a specific brand value proposition for Destination Europe and increasing awareness of niche travel experiences in lesser-known destinations building on the Horizon 2022 strategy.

The campaign was composed of five pillars; an influencer marketing programme (KOL, other influencers, and press trips); a digital marketing programme; a trade outreach programme (FAM and PR events) and Co-Ops (partner-led collaborative promotional campaigns). The Co-Ops were to target both the travel trade and end-consumers (with focus on FITs). Each programme was to support the promotion of trans-European products/experiences linked to three themes: Slow Adventure, Creative Europe and Europe Remembers. Objectives were defined as:

- Define a specific brand value proposition for Destination Europe
- Increase awareness of unique travel experiences and lesser-known destinations in Europe among global passionate communities of travellers
- Provide opportunities to promote European destinations
- Foster transnational PPPs that leverage resources for joint promotion of Destination Europe

The marketing actions were to contribute to the delivery of the Horizon 2022 strategy, and its objectives to "build a distinctive image of Europe as a travel destination in long-haul markets". A distinctive image should attract the attention of niche audiences from across the globe and thus contribute to economic growth and development of European destinations. Interest then contributes to balance dispersion of visitor's flows (in terms of geography and season).

The proposal defined KPIs for each of the marketing programmes (see Appendix F.). Additionally, the proposal envisaged (under WP3) to provide a global overview of potential tourists' digital demand, which results were to provide insights into Europe's brand awareness and provide an indication of the overall performance of Europe as a tourism destination. While activities were implemented under the planned programmes, the programme changed in terms of approach as a result of the pandemic. Changes related to:

- The campaign messages. with several lines of actions focusing on travel reassurance in the context of the pandemic
- Action integration and consistency. Where the proposal envisaged one campaign, underpinned by several programmes, programmes appear as separate campaigns
- Target markets: grant activities were to target long haul markets, but sets of actions in practice targeted European markets – consuming one third of all marketing cost
- Thematic focus: whereas most of the campaign implemented focused on the defined three thematic passion areas, not all marketing actions did

- Implementation mode: whereas the Co-Ops were intended to be partner-led, some changed approach, with the ETC being design and implementation lead (3 in 6 campaigns)

The following actions were implemented:

- **Content Marketing Programme:** and key messages for content, *Slow Adventure Guide*, production of audio-visual assets, TV spots, videos for digital outreach, dedicated landing page: Europe invites the Curious (which was to operate the main campaign headline – including brand strategy; campaign landing page and passion point pages within the portal VisitEurope.com under the tagline "Europe invites the Curious", videos in different languages to be used in promotional campaigns, AMP travel stories and editorial articles – with market adaptations into Chinese, French, Japanese and Portuguese)
- **Digital Marketing Programme:** Global distribution of travel stories; brand campaign consumer communication and promotional campaign in the United States under the tagline "Europe invites the Curious" and Global organic distribution of content marketing, and We are Europe campaign targeted the European market
- **Influencer Marketing Programme:** pan-European virtual trips for 17 international micro-influencers
- **Travel Trade Outreach Programme:** 3 FAM trips for niche tour operators & virtual B2B Matchmaking event in China along with a reassurance campaign targeted the North American market
- **Thematic Promotional Campaigns:** 7 co-branding campaigns in partnership with 62 European co-financing partner destinations and travel brands.

The Co-Ops consumed most of the budget (67% of subcontracted costs and half of the total grant). Two campaigns stood out: the Open to Europe campaign (29% of subcontracted funds and 43% of Co-Op funding) and Wanderlust, Wonder Europe (13% of total subcontracted budget). Most of the remaining budget was allocated to Content and Digital Marketing Programmes (26% of subcontracted). Performance reporting was done at two levels: at the level of the individual programmes and campaigns, as well as sub-programmes, and overall, thematically covering the three themes.

Overall performance of the grant

Overall effects were measured in terms of changes to the interest in in-bound travel to Europe as well as in searchers of target groups – though research was not undertaken for all campaigns. Reports showed a growth in online conversation across the themes and topics. In some cases, this led to a more focused discussion on the promoted topics within the total conversation about the destination. Conversations are said to have improved the overall European travel sentiment by a considerable margin. Most of the topics enjoyed a positive tonality pulse (meaning they enjoyed a better sentiment amongst online users during the campaign than they had prior to it). They also boasted with what the report describes as positive "Tonality Impact", meaning that sentiment for those particular topics was considerably higher than the average sentiment of general conversations about European travel.

The evidence, however, also suggests that measured conversation change, did not necessary translate into change in consumer behaviour during the dreaming and consideration stages. In contrast to other global regions, searches of Passion Communities in Europe was down in comparison with pre-pandemic levels. Europe lost 13.7% of tourism searches for Passion Communities. Europe's competitors experienced a demand growth of 5.17% for Passion Communities in the same period – suggesting that progress towards attracting passion driven consumers has been limited.

Performance of the Co-Ops

Co-Ops (which constituted the majority of funding) performed well when considering, participation, partners' satisfaction, outputs, engagement, and – where measured – conversion and travel intent.

- Campaigns performed well when considering reach, and engagement, with strong interaction, click through and dwell times – meeting or exceeding the set KPIs. Campaigns also included selected innovative measures, such as long live streaming
- Three campaigns (Open up to Europe; Slow Adventure in the Balkans; and Creative Cities of Europe), included conversion (search and booking) data. Accumulated, they generated a total of 4.7 million searches and 166.4K bookings. The lion share was generated by the "Open to Europe campaign", which by itself generated 4,4 million searches and reportedly 164K bookings, for 287K consumers. Performance of the two other campaigns was more modest (61.5K searches and 2.4K bookings), but travel restrictions should be considered when reading results

Performance of Marketing programmes and ETC implemented campaigns

Other marketing programmes and ETC implemented campaigns performed well, though there are differences in achievements. Headline results include:

- The Europe Invites the Curious campaign performed strongly, delivering 20.5 million impressions, and reaching almost 6 million U.S. consumers. the campaign delivered a strong interaction rate (2%) double the set benchmark, high video views and high VTR. Audiences reached by the campaign undertook 145K searches and 5.5K bookings for over 8,000 passengers and 56,500 estimated nights. The campaign, in addition, creating a pool of over 4.2 million U.S. consumers who can be targeted in future campaigns creating a long-lasting impact
- B2B activities (FAM trips B2B and matchmaking) performed strongly considering satisfaction, and likelihood to include destinations in new offers . The results of the Travel trade reassurance campaign was mixed.
- "We are Europe" Brand Campaign (main deliverable was a TV ad distributed via Euronews) generated an estimated 19 million unique viewers and 425K views on digital platforms. Further analysis, however, is hampered by lack of data
- European Story Network and the Influencer Marketing Programme performed fairly

4.1.3.1 Overall grant performance

Overall effects were measured in terms of changes to the interest in in-bound travel to Europe as well as in searches of target groups (as indicators of impact on consumers in the dreaming and consideration stages). Additionally, some campaigns included data on the impact on bookings and travel intent (though not a primary objective).

Impacts on consumer attitude and behaviour during the dreaming and consideration stages

Analyses were undertaken thematically, as well as in relation to 5 of the 7 Co-Ops (not covering "Open up to Europe" and "Europe behind the scenes") and well as covering the Europe Invites the Curious/global experience Europe campaign (under the digital marketing programme). Additionally, a separate analysis of Europe's Touristic Appeal of Passion Communities digitally was undertaken, focusing on digital demand, measuring interest and attractiveness through the volume of searches carried out in search engines. While these horizontal measures do not cover all activities under the grant, they provide an aggregate indicator-based assessment of the performance of most of the B2C campaigns undertaken.

Results do not provide a uniform response to the performance of the campaigns. Reports showed a growth in online conversation across all themes and topics. In some cases, this led to a more focused discussion on the promoted topics within the total conversation about the destination. However, this was not true across all topics and actions.

Conversations related to the topic are said to have improved the overall European travel sentiment by a considerable margin. This was particularly the case with Creative Cities, Slow Adventure in the Balkans, and the Europe Invites the Curious campaign. Most of the topics enjoyed a positive tonality pulse (meaning they enjoyed a better sentiment amongst online users during the campaign than they had prior to it). They also boasted with what the report describes as positive "Tonality Impact", meaning that sentiment for those particular topics was

considerably higher than the average sentiment of general conversations about European travel. The reporting also featured a measure of the overall diversity of destinations within each topic, ranging from Fair to Excellent.

While those approaches are innovative and could be regarded as proof of the project's impact, the end result in terms of reporting is not immediately apparent. The conversation pulse metrics seem designed to impress, using innovative terms and metrics. However, they provide little in terms of methodology behind the benchmarks that lie at the heart of any conclusions to be made from the data. Using the average sentiment or conversation focus for European travel at large is a suitable approach, but there is no mention of what measurement led to setting them up in the first place. Only the gap between the project themes and those averages is shown. A more streamlined and accessible approach might have provided results that are easier to decipher and evaluate.

The analysis of Europe's Touristic Appeal of Passion Communities digitally further suggests somewhat mixed results, in terms of generating a quantitative and qualitative change in consumer behaviour during the dreaming and consideration stages.

More than 1.55 million web searches related to history, cities, adventure travel, and gastronomy in Europe were performed by consumers globally during the duration of the campaigns. While these numbers are impressive, it is unclear whether these results were positively impacted by the activities under the grant 8. The fact that searches of Passion Communities in Europe are down in comparison with pre-pandemic levels (in contrast to findings for most other regions) suggests that progress towards attracting passion driven consumers has been limited. Over the campaign period and the first year after the Covid-19 outbreak (April 2020 and March 2021), Europe lost over 40% of its general tourism searches and 13.7% for Passion Communities. Europe's competitors (the United States, Asia, Australia, and South America) altogether experienced a demand growth of 5.17% for Passion Communities in the same period.

In terms of the sheer number of searches for Passion Communities, Europe ranks third out of the five regions included in Bloom Consulting's research. On the other hand, Europe's generic touristic appeal follows a different pattern than that for Passion Communities. Europe's generic tourism demand (8.4m) has a similar volume of searches as the United States (13.7m) and Australia (9.9m) between October 2020 and September 2021,

Figure 7 – passion community related searches

As represented in the tables below, Europe was the most impacted destination by the Covid-19 crisis, and is recovering slower than its competitors. When analysing *the impact of the crisis (table 1)* and the R*ecovery (table 2)*, Europe occupies the last position compared to the benchmarked destinations, with -13,7% and -9,5% negative impact respectively in searches.

Table 1. Benchmark of Passion Communities
Covid-19 impact
Apr 2019–Mar2020 vs Apr 2020–Mar 2021

#	Destination	Covid-19 Impact
1	South America	+16,1%
2	Asia	+13,0%
3	United States	-1,1%
4	Australia	-7,2%
5	Europe	-13,7%

Table 2. Benchmark of Passion Communities
Covid-19 recovery
Q2 and Q3 2019 vs Q2 and Q3 2021

#	Destination	Pandemic Recovery
1	Asia	+73,1%
2	South America	+67,1%
3	Australia	+14,6%
4	United States	-6,4%
5	Europe	-9,5%

Impact on bookings and travel intent

Results in relation to actual travel intentions to Europe and bookings were monitored in relation to four campaigns – three Co-Op campaigns and the "Europe Invites the Curious" campaign implemented under the Digital Marketing Programme,

The "Europe Invites the Curious" campaign targeted groups of U.S. consumers. Flight and hotel bookings were undertaken among audiences exposed to the campaign, The campaign led to 145,000 searches and 5,500 bookings for over 8,000 passengers and 56,500 estimated nights – coming from users who were exposed to the campaign. Those actions could be traced to the effects of the campaign and, thus, represent a behavioural impact resulting from it.

The same is true for three of the seven co-branding campaigns, namely "Open Up to Europe", "Slow Adventure in the Balkans", and "Creative Cities of Europe". "Open Up to Europe" reportedly resulted in almost 4.4 million flight and hotel searches performed by consumers who were exposed to the campaign. Searches translated into 164,000 flight and hotel bookings and more than 287,000 travellers, who generated an attributed hotel revenue of at least €41.8m. "Creative Cities of Europe" reportedly contributed towards 34,094 total searches of travel in Europe and 1,357 total bookings to Europe. The portion of "Slow Adventure in the Balkans" targeting the USA and Canada achieved 27,475 total searches to Europe and 1,084 total bookings. No such data was available for the Chinese campaign.

Other metrics did not provide evidence of a connection between travel trends and the activities carried out under the grant. However, across activities output and results indicators were systematically populated. When benchmarking this data against the set targeted and analysis shows that in terms of delivery and engagement the actions have overall performed very satisfactorily, although variation may be noted in terms of performance. A headline overview of these results is presented below.

4.1.3.2 Thematic Promotional Campaigns

The main deliverable of the grant consisted of 7 co-branding campaigns in partnership with European co-funding, partner destinations and travel brands. The main KPI was measured in terms of partners' satisfaction from it. Both the ETC survey, and interviews undertaken in the framework of this study show that the vast majority of participants were satisfied with participation. Key results for each of the campaigns are presented below.

Open Up to Europe "Open up to Europe" was a digital pan-European campaign aimed at reinforcing consumer confidence and stimulating pent-up demand for travel during the summer season of 2021. Led by the ETC, in collaboration with some 30 NTOs/DMOs, tactics included the microsite OpenUpToEurope.eu, a TV spot and advertisement across editorial environments and social media. The campaign targeted a particular age bracket in 14 European markets via different media (social, web, TV). The campaign resulted in:

- 27 million impressions on Lightbox, with an interaction rate of 2.84% (double the initial KPI set for interaction rate)
- 70 million impressions from retargeting ads. Different units reportedly had different KPIs set. Two of the four units (Hilton Video and Donegal Video) surpassed their benchmarks for completed video views (60–65% and 53% respectively against a benchmark of 50%)
- 75 million impressions on social media (22 million over the initial KPI). Social activity delivered almost 200,000 engagements, contributing to a CTR of 0.25% (against a 0.1% target).
- Microsite visited by 46,424 users who accumulated a total of 66,957 page views. No benchmark or KPI mentioned in that respect.
- Euronews Partnership that reached a potential 74.3 individuals via TV ads (expressed as the total number of people who could see the campaign), plus an additional 500,060 digital impressions, accompanied by 2,246 clicks. No KPIs mentioned in this respect.

This was the campaign that offered the most concrete results in relation to actual travel intentions to Europe. In what could be described as an actual impact of the project, it reportedly resulted in almost 4.4 million flight and hotel searches performed by European consumers who were exposed to the campaigns. These searches translated into 164,000 flight and hotel bookings and more than 287,000 travellers, who generated an attributed hotel revenue of at least €41.8m. The age and income breakdown of users searching for information and booking flights/accommodation coincided with the main target group of the campaign. it is also the campaign which provides the most detailed data for cost assessment.

Overall these achievements were generated chiefly by paid outreach. The campaign was overall modestly successful in generating earned mentions and mostly successful in terms of generated a sustained conversation, following the end of the campaign period. Positive however, the mentions generated part of the campaign focused correctly on the message that Europe is a safe destination for travel during the pandemic with a lot of weight being put on the re-opening of tourism in the second summer of Covid.

Creative Cities of Europe. This campaign, targeted at the US and China and implemented in collaboration between NTO Germany VisitFlanders, involved the creation of a lightbox hub, banner ad units and other digital assets. Content was distributed through premium editorial environments and social media ads.

The campaign has hit/exceeded all KPIs with high dwell times, interaction rates, engagements, clicks and reaching almost 8 million in the US and Canada. Despite Covid-19, the campaign has also performed strongly from a searches and bookings perspective with great exposure to the campaign via Adara Impact to OTA partners, via Travelport to trade audiences and through activity in China.

The campaign was very well received in the USA and Canada with significant interaction rates (~2,5%) well above set goals (~1%) for the lightbox hub. Banner ads and social media reach was over 10 million with a CTR of 0.87% and 0.11% which is above industry standards.

The whole campaign has achieved 34,094 total searches to Europe and 1,357 total bookings to Europe, with January and March being key months. However, searches and bookings were highly affected by Covid-19 travel restrictions, so a direct connection between the campaign and those searches/bookings cannot be made.

Wanderlust, Wonder Europe. Wanderlust was a digital campaign targeted towards Chinese FITs through the distribution of content on relevant Chinese social media platforms, a dedicated landing page on Weibo, Chinese travel, and celebrity KOLs, as well as dedicated videos. Led by the ETC, it involved +30 different NTOs and DMOs.

The campaign led to a significant increase of WeChat followers from ~5k to ~30k. A small drop was seen on Weibo. As part of the campaign new channels such as Douyin were developed. As part of the campaign a WeChat Mini Programme was created where WeChat games were hosted, but the data provided only showed ~5k pageviews and ~1.5 clicks for a period of 6 months, which appears to be underperforming.

The dedicated hashtag on Weibo #**与欧洲不**见不散# performed well with over ~160 million impressions and ~4.5 million video views. Though, this did not lead to an increase in Weibo followers. 15 KOLs and 1 Ambassador(star) Zhuzheng Ting were involved in the campaign with KOLs contributing to about ~20 million impressions and modest engagement on posts (however, it should be noted that they streamed virtual events and there is no data about the engagement of the events, only the posts of the KOLs). Zhuzheng Ting's campaign was considered highly successful with over ~25 million impressions and significant engagement.

Overall the Wanderlust, Wonder Europe campaign delivered on its set KPIs. Sentiment analysis showed that passion-based communications help fuel a very positive sentiment towards European travel "at large". The sentiment confirms good response to event-driven tourism among Chinese, as well as recurrent appeal for classic drivers in China.

Slow Adventure's Hidden Heartlands. The digital campaign, covering all Ireland and implemented in collaboration Tourism Ireland, Fáilte Ireland and two Irish DMOs focused on the creation of a lightbox hub, landing page, video ad units and other digital assets. Distribution through premium editorial environments, with special focus on AFAR, and social media ads.

B2C activities. For the period of the campaign (July 1st – October 14th, 2021) posts containing the campaign's messages reached a total of 4,442,000 online users, accounting for 27,610,000 impressions in total. This represents a 12% growth in users and 49% growth in impressions compared to the period prior.

Mentions within the exact scope of the campaign (slow tourism/adventures and the destinations part of the campaign, like Hidden Heartlands, Derry, etc.) reached 69,430 users, accounting for a total of 166,160 impressions. This portion of the conversation was more reliant on news media and specifically on afar.com the campaign partner. The majority of mentions came from pages and accounts of organisations and institutions involved in the campaign (Failte Ireland, Visit Offaly, etc.).

The available data does not provide evidence that owned content managed to provoke any noticeable, long-lasting consumer talk. Most mentions came from the accounts of local tourism organisations and the official accounts of Slow Adventure Ireland. Any significant reach was achieved almost entirely thanks to owned and paid posts, including those from accounts

affiliated to media partner afar.com. Thanks to the partnership with travel news website afar.com whose journalist Rachel Rudwall became an ambassador of the initiative. Her posts reached a wider audience and also promoted the "slow travel" aspect of the initiative.

In terms of user-generated content, the hashtag #slowadventureireland is still popular on Instagram to this day, with users putting it alongside hashtags such as #visitireland and #discoverireland among others. Those posts however do not seem to be inspired by the campaign. Notably, there is no mention of #irelandshiddenheartlands in any of the recent user posts. Manual search on Facebook did not yield any recent mentions of the hashtag, apart from posts by the official page.

B2B activities included 3 webinars, newsletters, e-zines, and trade-focused activities. The B2B part of the campaign delivered a total of 26 million impressions against a target of 24 million thus meeting and exceeding set KPIs. The lightbox content performed well with higher-than-expected dwell times. Website and newsletter performance surpassed average AFAR performance. As part of the campaign, video content reached ~2.7 million views showing that video ads and an average CVR of 65% (with the Connected TV channel performing the best).

E-zine underperformed for the target market; however webinars were largely successful with twice as many attendees as expected. Attendance time was also quite high throughout all 3 webinars. While there is data on the performance of the campaign, the impact of the campaign is difficult to measure. The campaign also lacks sentiment monitoring data.

Slow Adventure in the Balkans. The digital campaign in China focused on itinerary promotion on Qyer, creation of a Mafengwo Travel Guide, advertisement on Tuniu, social media ads, an offline event and B2B online training for Chinese operators.

Engagement on Weibo significantly outperformed initial estimates with the hashtag #欧洲野性灵魂# leading to over ~17 million views (2 million projected). While detailed breakdown data was not **provided**, engagement appears to be low at just ~3k discussions on the topic.

Tuniu, Qyer and Mafengwo landing pages performed in line with set goals meeting KPIs at an average of ~117%. However, no data on actual impact was provided about the number of booked packages (for future use).

Dragon Trail's webinars and training courses underperformed and did not reach the set number of attendees and registrations. Considering the fact that those were online events and currently no leisure travel is easily available to Chinese people, this may explain the lower interest for tour operators. The campaign appears to have generated a particularly large array of emotions in social conversations, well connected to the actual "Covid-19 travellers' mindset" (responsibility, sustainability, outdoor, reconnection, exploration).

Nordic Tourism in China Implemented in collaboration between the Nordic NTOs, this digital campaign in China aimed to promote sustainable travel in the Nordic countries through the concept of "slow travel". The campaign livestreaming (3 sessions of 6 hours each), videos, social media ads, a WeChat Mini Programme, activation of Chinese media outlets and KOLs, as well as an offline media event.

According to reporting, the media exposure and video views KPIs are in line with expectations, however social media engagement and campaign website outperformed initial goals (although it should be noted that metrics for the Weibo Topic were included as engagement and campaign website which skews the data). Long-format livestreaming attracted ~900k people, Sweden was the most viewed destination (~380k viewer) compared with Denmark and

Finland (~260k each). This type of long-form streaming does not appear to be very common in China thus the increased interest for the campaign.

The campaign's cooperation with KOLs was largely successful as various content was viewed over 3 million times. The campaign's sentiment impact was largely positive with a growth of ~10% in the topic of "Nature and the Outdoors" with an overall positive sentiment. The concept of sustainability resonated well with the Nordics and was amplified by the traveller's desires post-Covid. The campaign appears to have activated increased interest in Scandinavian destinations among Chinese tourists as a unique experience, however, since they cannot travel it cannot be measured if it will translate into an actual increase in tourists.

Europe Behind the Scenes Led by the ETC, in partnership with some 30 DMOs and NTOs, this campaign involved the creation and distribution of a mini-series of videos with local correspondents presenting authentic stories and experiences in Europe, social media promotion and a series of livestreams. The campaign led to a slight increase in Weibo and WeChat followers, but a significant increase in Douyin, thus confirming the popularity of the short video format when it comes to marketing in China.

The campaign met all of its set goals. It delivered a significant number of interactions ~230k across all the sub-campaigns (with a set goal of just ~70k). Spain and Nice performed better at achieving reach and engagement KPIs than Zagreb and Czechia, for example. It is unclear if this is because of better content or the fact that Chinese are generally more familiar with Spain and France as opposed to CEE destinations.

The campaign itself ran on a number of different channels with some tourism boards opting to use their own channels as well which makes monitoring significantly more difficult given lack of access to analytics. Reporting on sentiment monitoring was not available in the shared files.

4.1.3.3 Digital Marketing Programme

The Digital Marketing Programme consisted of a number of different elements, namely the global distribution of travel stories (European Story Network); the "We are Europe" brand campaign; the "Europe invites the Curious" consumer communication and promotional campaign in the United States, and global organic distribution of content marketing.

Most elements operated digitally. However, the "We are Europe" brand campaign, which was developed as a result of the pandemic, operated chiefly through TV advertising on the Euronews TV channel.

If judged against the stated targets, the different marketing programme elements performed well on most indicators, with especially the Europe Invites the Curious, strongly performing on output, results, and impact indicators. The different lines of actions under the Digital Marketing Programme generated, collectively:

- 4353 hashtag mentions, delivering a total +25,76 million digital impressions on western channels (171% of the goal). The bulk of the impressions were generated by the Europe Invites the Curious campaign which ran in the US, and which generated 20.5 million impressions. Additionally 8.5 million hashtag impressions were registered in China (WEIBO and WECHAT).
- 40,703 leads (four times the initial goal). The number of leads represents an overall number of new social media followers that the campaign's various profiles have gained during the course of the action. Those are users that could be exposed to further campaigns initiated by the ETC. Most were on Instagram (+23K) and twitter (+11K), with no measurable impact on Facebook followers, and only marginal increases on the ETC's YouTube channel (+150). Overall, the channels that have had the most engagement have been Instagram and

Twitter The accumulated number of leads generated on the ETC's accounts on Chinese channels was 7.9K.

- 50,978 page views (52% of target) of the four main campaign subpages (the main campaign page, and the three subpages related to the annual theme).[37] Measured in terms of absolute clicks, the "nature and outdoors" themes performed relatively better (18.7K clicks) than the creative cities themes (13.8K clicks) and the history theme (10.5K clicks).

  69% was generated from the US, reflecting the US targeted Europe invites the Curious campaign (with +98% of US visits resulting from the paid campaign). An additional 9% stemmed from Belgium, Northern Macedonia, and Portugal. Average dwelling time for visits to the main campaign pages was 32s to 37s, with a bounce rate of 32% to 32%. Additionally, there were some 8000 view of travel articles, with top performing stories generating in the range of 130 to 350 views.
- Dedicated social media groups[38] also generated some traction, but the overall number of group followers was small (accumulated 1.6K).
- The We are Europe" brand advertising campaign, reached around 9 million unique viewers on TV. Additionally, the video spot was watched a total of 425,000 times on web and social media

Reportedly, user sentiment towards content shared during the campaign was 40% more positive than the average sentiment for European travel. Taken on face value, and given the twofold improvement upon the set targets, this represents an actual outcome of the campaign. It could be interpreted as a significant number of people showing a more positive attitude towards European travel. Considering the different elements/campaigns undertaken under the programme, headline performance may be resumed as follows.

Table 8 - performance of the campaigns and other actions under the programme

	European Story Network	Europe Invites the Curious	We are Europe" Brand Campaign
Output indicators	135 stories distributed +110,000 impressions .	Strong output performance • 20.5 million impressions, Almost 6 million U.S. consumers reached • Strong interaction rate: 2% or double the set benchmark. • Video ads were seen over 5 million times.	Main deliverable was a one-minute TV distributed via Euronews with the aim of encouraging intra-European travel in 2020, 149.1 million individual impacts (understood as OTS), with an estimated reach of 19.1 million unique viewers 425,000 views on web and social media Unspecified press coverage and social media mentions +60 downloads of the campaign kit
Result Indicator	Fair performance: +8,000 story views - average 60 views per story Top performing article: Explore contemporary	Strong engagement • Average dwell times of 2.01 • Average CTR 0.13% (following retargeting)	There is no information on DMOs campaign participation, or on the performance of the campaign microsite. Any

[37] Europe invites the curious; and Europe is for the #NATURALLYCURIOUS; Europe is for the #HISTORICALLYCURIOUS' and Europe is for the #CREATIVELYCURIOUS

[38] Facebook groups on Nature and the outdoors; Creative Cities, and history and Ancestry and We Chat Groups)

	architecture in Europe's vibrant cities (541 views)	• Strong interaction rate (2%) double the set benchmark, • High view through (75% VTR).	further assessment of the campaign's effect or effectiveness is hindered by the lack of KPIs, of any meaningful reports of the spot's effects on viewers, and data on potential usage of data from the toolkit.
impact indicators	Data on consumer engagements is available only for stories and does not provide any definite conclusions on their impact. There is no mention of KPIs set for this action	Generated 145,000 searches and 5,500 bookings for over 8,000 passengers and 56,500 estimated nights. This translated into at least €1.2m in hotel revenue. Given that searches and bookings can be traced to campaign activities, those results can be regarded as an actual impact of the campaign Created a pool of over 4.2 million U.S. consumers who can be targeted in future campaigns. This creates a long-lasting, replicating impact that meets the expectations for stimulating sustainable demand	
Other aspects		Campaign sustainability: Campaign hashtags mentioned over 870 times between September 30th, 2021, and August 20th, 2022. VisitEurope's own channels continue to use the hashtags predominantly on Instagram. Hashtags used by third party social media users also after the campaign's end, Hashtag mentions however, largely were concentrated on organisational accounts (low pick up of individual users). Comments on the post within the scope of the campaign are generally positive with the use of lots of emojis and positive statements about how beautiful and unique Europe is During the campaign the Visit Europe Instagram channel had an increase in followers and engagements when compared to a previous period	

Source: European Travel Commission (2019) reporting data and case studies

4.1.3.4 Influencer Marketing Programme

Following changes necessitated by the Covid-19 pandemic, the main task of the action was to organise pan-European virtual trips for international micro-influencers which through their social media content were to deliver, as set targets: 18 million impressions (views or reads) and 180,000 mentions (tags/hashtags).

In total the programme managed to engage 17 micro influencers from 6 markets (China, US, from Canada, Japan, Brazil, and Australia). The micro-influencers ended up sharing a total of 114 posts and 243 stories which reached almost 7.6 million impressions (42% of the goal) and earned a total of 4,346 hashtag mentions (2% of the goal). Additionally, the campaign reported 60,600 post engagements (or an average engagement rate of 0.8%) and 35.26 million hashtag impressions.

The lion's share of the impressions were generated In China (7.2 million impressions and 16K interactions – or an interaction rate of 0.2%). Influencer posts from other markets generated

fewer impressions (370K) but very high interaction (44.4K, or an average interaction rate of 12%). There are, no indicators which traced as to whether the audience exposure has led to any positive effects on Europe's standing amongst long-haul visitors.

4.1.3.5 Travel Trade Outreach Programme

The travel trade programme aimed to facilitate building business relationships with buyers who can sell to FITs products linked to the three main pan-European themes. Its main expected outputs were a series of familiarisation trips (FAM trip) for niche tour operators. Given the pandemic, the planned activities partially altered, with new activities replacing some of the planned FAM trips. Consequently, the sub-WP included: FAM trips for niche tour operators focusing on (semi-)FITs from North America; a virtual B2B Matchmaking event in China for European destinations and exhibitors from the wider travel industry and a reassurance campaign targeted towards the North American (USA and Canada) travel trade.

FAM trips. Due to the start of the pandemic, only 3 FAM trips were organised with subsequent events substituted with virtual/online activities. The FAM trips performed very well. In total 14 North American Operators participated in the three trips organised (14% of the set participation targets). Reported satisfaction amongst participants was above 90% (93%) in line with other FAM trips from other years and above the set target of 80% satisfaction.

86% of participants reported that they were likely/very likely to include the destination in their itineraries, (against a target of 80%), and a Net Promoter Score (NPS)[39] of 71 was achieved (against a target of >40 NPS). However, whether destinations were included in their itineraries was not measured and considering the start of the pandemic, it was unlikely that those were prioritised.

Virtual B2B event The virtual B2B event was delivered in line with pre-set KPIs. Over ~270 Buyers (against a target of +200) attended with 126 Exhibitors and NTOS from more than 20 ETC/EU Member states, with a meeting competition rate of 95% (against a target of 85%). Overall, satisfaction from the event was quite high amongst exhibitors with 90% very satisfied/satisfied with the conversation with buyers and over 97% very satisfied/satisfied with the services they received throughout the event. One-on-one meetings were considered to be the most valuable takeaway from the exhibit both for Buyers and Exhibitors. An average of 16.4 meetings per exhibitor was organised against a target of 15, Meeting numbers for different exhibitors, however, were highly variable.

80% of Buyers indicated that they would be very likely/likely to include destinations from the event. There is no data on whether or not Buyers took the steps to do that.

Travel trade reassurance campaign In the context of the pandemic a three-month travel reassurance campaign was organised. A programme was organised in both the US and in Canada, with the aim to build awareness among travel advisors and tour operators to the exciting offerings and unique benefits of a trip to Europe. The campaign included multiple lines of action including banner ads, advertorials, video content, newsletters, webinars and an ETC landing page.

French language content (newsletter, advertorials, and video content) performed better compared with English with higher open and click rates. No set KPIs for the webinars were identified with the English webinar better attended than the French one. No satisfaction surveys

[39] Net Promoter Score (NPS) is an index ranging from -100 to 100 that measures the willingness to recommend a product or service to others (customers).

were done after the webinars, but nearly 2/3rds of attendees reported that Europe is doing a good job handling the pandemic and it has not changed their perception on Europe.

Traffic to the ETC website did not appear to be increased by the campaign as reporting shows only ~1.2k unique views, and 936 users for a period of 3 months. Ads and social media reach also had very modest performance. The most read articles on own channels had clickbait-like headlines such as "10 Historic Wonders You Must See in Europe" or "The Amazing National Parks in Europe You've Never Heard Of". The virtual event was well attended with 314 live attendees (~26% of registrations). US-focused reassurance campaign utilised newsletters with a modest open rate of ~10% and CTR varying from 0.2% to 0.9%.

4.2 To what extent have external factors influenced achievements attributed to the intervention? If the intervention did not produce expected outputs or results, is there evidence of faulty design or management failures

The largest and most significant external factor to the implementation of the grants has been the pandemic which has operated as a major external shock, impacting the marketing approach, the activities undertaken, the timeline and partner engagement.

There is nothing to suggest that grants have been subject to faulty design or management failures. On the contrary, all evidence points towards successful ETC management of the grants – and adaptation, when external factors have required change.

As presented above expected produced outputs, as identified in the ETC proposals, and specified in the defined KPIs have, largely been delivered, in many cases outweighing set targets. However, scope for improvement with regard to measurement remains, so as to assess achievements more accurately.

4.2.1 External factors

The largest and most significant external factor, to the implementation of the grants has been the pandemic. The pandemic may be considered as having operated as a major external shock to the delivery of grant 8, impacting on both delivery, timeline, and achievements. Main effects are associated with:

- Change in the overall marketing approach. While grant 8 planned for one integrated marketing campaign, with different marketing programmes underpinning it, Covid-19 implied resource shifts, and design and implementation of new actions. A notable feature was the roll out of campaigns targeted European markets (chiefly the design and implementation of the Open up to Europe campaign). In financial terms. Some 29% of total subcontracted costs (and 21% of total costs) were reallocated to the Open up to Europe campaign (€1.2m). Resources were also allocated to the "We are Europe" campaign though sub-contracted implications were small (3.2K)
- Extension of timeline, originally foreseen to last 19 months, the duration of the action and the reporting timeline was extended – to a total of 30 months
- Partner engagement. Following the start of the pandemic, 6 applicants (5 NTOs and 1 DMO), dropped out from their original Co-Op proposals. However, the fact that that partner led Co-Ops were replaced by ETC-led Co-Ops, significantly increased overall NTO and DMO participation (see section X)
- Impact on consumer behaviour. Selected campaigns, measured as outlined above, impact generated in terms of actual bookings. The booking numbers reported - especially under the "Slow Adventure in the Balkans" and "Creative Cities of Europe" which targeted long haul markets, can be assumed to have been impacted sensibly by the pandemic (with the "Europe Invites the Curious" campaign, being launched only in 2021)

Beyond the Pandemic, there is nothing to suggest, that there has been major external factors, If actual delivery, and associated outputs, are reviewed against the set requirements and the ETC proposals – there is overall close alignment.

The requirements to support the ECYT, may chiefly be considered as an opportunity. The fact that many other actors engaged in the year, delivering a large number of marketing (and other) activities operated in parallel to those of the ETC, along with the signalisation effect of the year, means that the generated YoY changes in inbound travel from China cannot be attributed to the grant-funded marketing actions – though they unquestionably have contributed hereto.

4.2.2 Design and management

Overall, the quality of visuals and marketing design (as implemented under the grants in focus) is seen as good. There is, in general, satisfaction with achievements (as known), delivered by the marketing actions, and satisfaction with the implementation processes. Overall the ETC is perceived as supporting very well process and implementation, and satisfaction with Co-Op participation, as well as in participation in other activities is high.

There is also evidence that the ETC has pro-actively mitigated negative impacts of the pandemic, by redesigning the marketing strategy, adding new lines of action, and taken over management responsibility for the design and implementation of Co-Ops under grant 8.

Weaknesses in the choice of design, are, when noted, seen rather to relate to the number of activities. Especially, the EU China was seen as characterised by too many small sub-campaigns and dispersed activities. In this respect some interviewees have called for fewer actions going forward, but with more financial weight behind them, so as to allow a bigger boost (i.e. paid outreach). A few interviewees also called for more innovative content going forward.

Management challenges, are, when observed, considered to be related chiefly to reporting and administrative burden, associated with EU grant funding – i.e. reporting and administrative requirements for Co-Ops (not ETC management). There is ad hoc evidence that at least one NTO has discontinued participation after the first Co-Op wave. However, the ETC has mitigated such effects with changed management structures for delivery.

The expected produced outputs, as identified in the ETC proposals, and specified in the defined KPIs have, largely been delivered – in many cases with outweighing set targets – in some cases underperforming. Variation in performance can be expected, and as such, cannot be considered a result of faulty design or management failures. There is unquestionably, a learning process involved in the design and delivery, with clearer and much more focused objective setting and strategy – as outlined in the grant 8 proposal.

Learning, with respect to performance monitoring, and result focus, is also a feature. There is considerable improvement from grant 7 to grant 8, with clearer focus on effect measurement and reporting. However scope for improvement with regard to measurement remains. This regards both the measurement itself, and the consolidation and analysis of data. Looking across the four grants the following aspects should be noted:

- **Population of agreed indicators** Indicators, as specfified in the ETC's proposals are in some cases not populated. This is especially true for the earlier grants, and in particular grant 7. There is considerable improvements between grant 6/7 and grant 8.
- **Partial progress in measurement only** While measurement is a focus area, and progress may be observed between different grants, there is not a consistent improvement over time. Grant 5 did provide audience measurement, among the target audiences, aiming to assess

the net effect of the principal activity undertaken. Similar measurement –and more generally consistent pre- and post consumer polling or brand tracking (considered good practice see section X) cannot be observed for subsequent activities. A possible contributing feature is the relatively low budget allocations to evaluation reflected in the ETC budget distribution. Illustratively, the call for grant 8, indicated that a maximum of 50K of the EU funds (or 1.1% of the EU budget) was to be spend on evaluation of results (WP 3). This budget was futher decreased in the proposal (to 40K of co-funding and total budget of 54K)), though subsequently increased to (111K total and 80K EU cofunding). This represents 2.4% of total subcontracted costs (and 1.8% of of total). This compares with a total of 8.8% of subcontracted costs under grant 5 (Ipsos Mori costs), where opnion polling was undertaken to assess net effects.

- **Lack of clarity on agreed indicators with sub-contrafctors** Judging from the reporting formats, it is unclear if KPIs were clearly agreed with subcontractors under grant 7. This weakness, in part, is likely to explain the lack of focus in the monitoring reports
- **Lack of consolidated outcome reporting** Reporting is not undertaken in view to provide judgement on the results. Reporting is driven by individual actions and undertaken by the different subcontractors. There is no attempts to consolidate this data. This results in a very large number of reports – reflecting the large number of activities undertaken.

5 Efficiency

This section addresses the evaluation questions related to efficiency and economy. The terms of references define four questions to be addressed under these themes:

- To what extent has the intervention been cost effective?
- To what extent are the costs of the intervention justified, given the results it has achieved? In particular:
  - which activities appear to have the best return on investment?
  - How the ETC's actions compare with similar actions of other Tourism Offices in Europe?
  - how the European Travel Commission's actions compare with similar actions of other Tourism Offices of key competing third countries?
- Could ETC have achieved better results, for instance thanks to a different timing of the intervention, a different approach to identify and control externalities and a higher critical mass?
- Is there evidence of waste, overpaying or gold-plating?

Not all questions are addressed in this section. The performance data, which is available is limited. Few indicators related to efficiency are populated across the campaigns and other activities. Even fewer are benchmarkable. Further challenges arises from the grant reporting. Reflecting these issues, questions have been reorganised, so as to cover (to the extent possible):

- To what extent has the intervention been cost effective? Which activities appear to have the best return on investment?
- How the ETC's actions compare with similar actions of other NTOs?

With regard to the other questions the following challenges should be noted.

Table 9 - Reasons for not addressing selected efficiency questions

Questions	Challenges

Could ETC have achieved better results, for instance thanks to a different timing of the intervention, a different approach to identify and control externalities and a higher critical mass?	This question would have required more detailed data than what is available. The lions share of quality data avialable is delivered in the framework of grant 8, which co-inside with the pandemic. Delivery and performance of grant 8 has naturally been impacted by this factor. Concluding that a different timing or a different approach to identify and control externalities, would be inappropriate, accepting that the pandemic, for grant 8 (and for the tourist industry generally), represent an external shock, which planning realistically could not have mitigated.
Is there evidence of waste, overpaying or gold-plating?	Analysis of potential waste, overpaying or gold-plating requires that unit data, of specific deliverables are available – so as to assess if the cost per different units are within the range of standard costs. Unit costs are not avalable. Data on specfic campaigns and other activity, is not broken down by deliverable. It is limited to overall costs of a given line of action (incl. production of the various deliverable and dissimination costs.

5.1 To what extent has the intervention been cost effective? Which activities appear to have the best return on investment?

Given the data available, it is not possible to assess overall cost-efficiency over the campaigns and marketing programmes undertaken. Within this limitation, the following findings may be observed:

- Changes in implementation design, has led to increased 3rd party contribution (financial or in kind). Accumulated 3rd party contribution, represent 57% of total EU funding – with the share being 88% under grant 8.
- Among the campaigns for which there is data Open to Europe campaigns stands out as having been particularly efficient. The average cost per search generated was €0.28. per booking generated the average cost was €7.8. ROI – measured as the campaign costs compared to total hotel value of bookings generated – was €1:33.85. Other campaigns performed much more modesly, but their principal aim was not to generate travel conversion.
- Data does not allow for cost efficency measurement – or comparision – as data on CPM, CPC, CPV and similar indicators are not available.

5.1.1 Overall spend, distribution and co-funding – overview and background

Accumulated actual costs associated with the four grants represents 12.8 Million EUR. The EU has spent an estimated 9.9 million EUR,[40] presenting an average co-funding rate of 74%.[41] Actual costs are mostly closed to budgeted costs.[42] Major lines of campaign expenditure are:

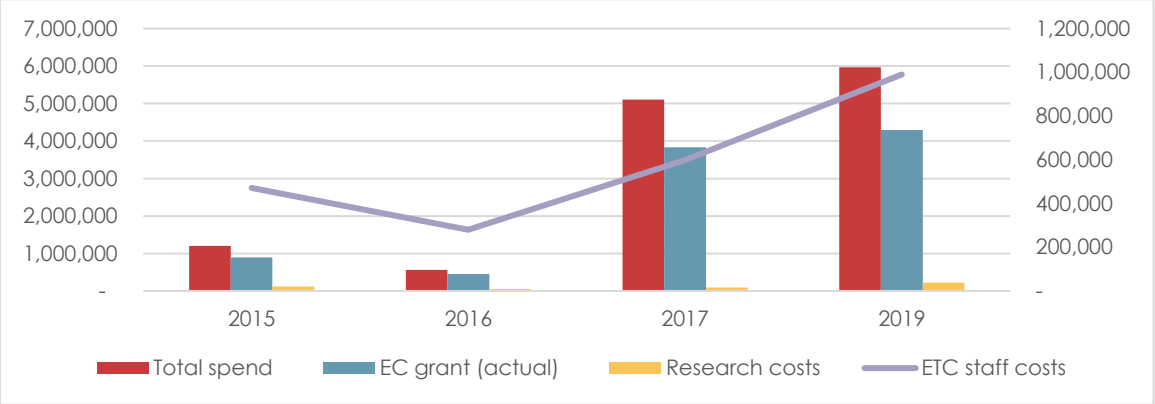
- **The EU-China Year of Tourism** (all actions) 44% of total costs (and 48% of EU co-funding)
- **The Open to Europe campaign** 10% of total costs (not accounting ETC staff inputs)
- **The ETC managed "Europe invites the Curious" campaign/programme:** 9% of total (not accounting for ETC staff inputs) – including cost associated with content marketing strategy to deliver relevant content about thematic trans-European tourism products and experiences to niche target audiences which is understood to have benefited also other campaigns.
- **The campaign Wanderlust** 5% of total actual costs (not accounting ETC staff inputs)

Costs, per grant period have increased significantly over the study period. Total costs in the first years ranged from €0.5 to €1.2 million(0.45 million to 0.9 million EU co-funding) – but raised to

[40] Subject to approval of the 2019 Grant budget which has only been submitted in 2022.
[41] EU contribution for the 2015 grant is not available in the file. It has been assumed that the co-funding rate was 75%
[42] Actual costs are on pair with the budgeted cost for the first two grants (2015 and 2016) but were 614K below costs in the case of the 2017 grant. It is understood that this difference is due to rejected costs that year. Costs for the 2019 are reported higher than planned costs (+236K).

€5.1m under grant 7. EU co-funding has followed, albeit at a slightly lower rate, reflecting that that co-funding rates dropped from 80% to 75% from the 2016 grant to the 2017 grant. The costs within scope of this study range between 90 and 97% (i.e. disregarding research costs).

Figure 8 – Total spend, EC grants, out of scope costs, and staff costs (staff cost in righthand column)

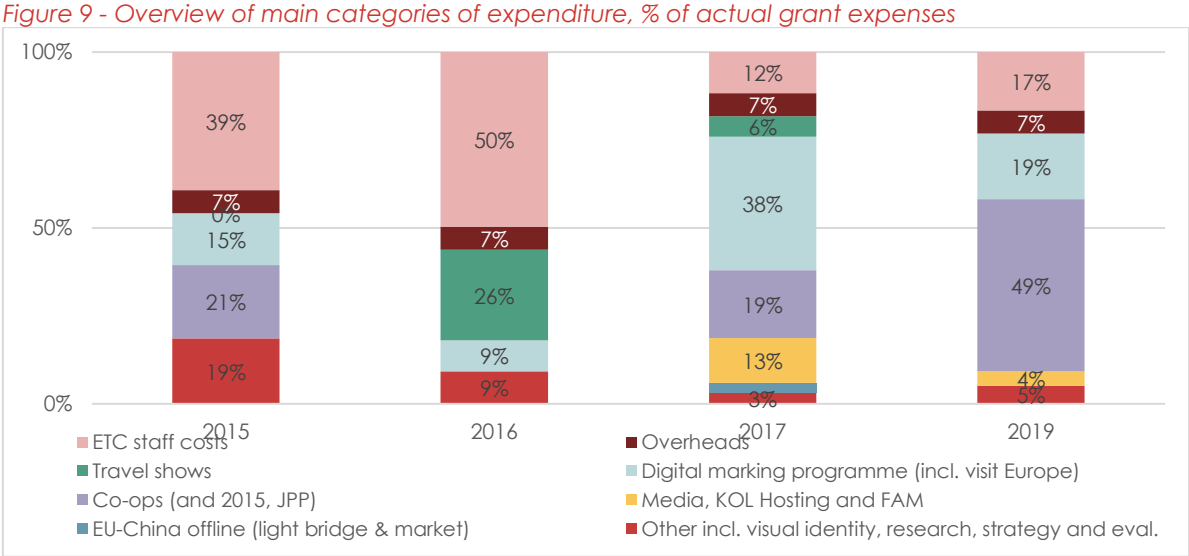


Source: contractors' analysis of the ETC's Final Financial reports, grants 2015–2019

The top lines of expenditure over the four grants relates to Co-Op campaigns: digital marking: (both content production and paid outreach); and staff costs associated with implementation. Co-ops consumed nearly €4m (30% of total expenditure), digital marketing €3m and ETC staff resources €2.3 million (18%).

There are marked differences between lines of expenditure over grant years. A main trend is that of increasing marketing spent, and relatively, decreasing spend on human resources. Other notable features relate to larger funds allocations to Co-Ops between 2017 and 2019, along with larger average campaign budgets to Co-Ops. Average Co-Ops was €121,500 under the 2017 grant (7 Co-Op campaigns). Average costs under the 2019 grant were €415,200 (7 campaigns). In part this is due to the large budget of Open up to Europe (€1.23m). However, when disregarding this campaign, average campaign costs are more than double those of the 2017 campaigns (€278,400 per campaign). Main categories of expenditure are presented in the figure below.

Figure 9 - Overview of main categories of expenditure, % of actual grant expenses



Source: contractors' analysis of the ETC's Final Financial reports, Grants 5–8

5.1.2 *Partnerships and leverage of external funds*

EU grants require co-funding. Required co-funding rates have ranged between 20% (grants 6) and 25% (grants 5, 7 and 8). For co-funding, the ETC has been reliant on contributions in kind and partner funding. In kind contributions constituted the required co-funding under grant 5 and 6. Reflecting a change in EC requirements, in kind dropped to <2% for the grants 7 and 8. Partners contributed with 1.28 Million for grant 7 and 1.63 million for grant 8.

Systems of co-funding, changed over time. Co-funding under grant 7 was concentrated on a few entities. Five regional DMOs[43] provided 75% of partner funding, associated with promotion actions led by the ETC. The remaining shares were provided by destination partners for Europe advertisement campaign on OTAs and Travel Trade Shows Co-Exhibitors. In total 27 NTOs and DMOs provided co-funding under the grant 7. While Co-Op partners were required to provide match funding (50%), this does not figure in reporting.

The number of co-financing partners greatly expanded under the 2019 grant. In total 62 partners provided co-funding under the 2019 grant. The essence of this funding (99%) was co-funding for Co-Op campaigns. It is not possible from the data to estimate the distribution of co-funding across the different Co-Op campaigns. However, reflecting the larger budgets, ETC-led campaigns (67% of Co-Op budgets) are likely to have generated a majority of funding.

Overall, the value of partnerships have increased over the span of the grants, with grant 8, having delivered co-funding at a rate of 20% above the set target. Grants have also benefited from various in-kind contributions, the largest under grant 8 (€2.15m). In total it may be estimated that the four grants generated a total of €5.1m in third party match funding and in-kind contributions – against an accumulated EU grant budget of €8.9m.

Table 10 - Partnerships, generated 3rd match funding and value of in-kind contribution

	Grant 5	Grant 6	Grant 7	Grant 8	Total
Co-funding generated (actual)	NA	NA	1,276,959	1,627,454	2,904,414
Cofounding against target (above/below)	NA	NA	-9%	+20%	5%
Value of in-kind contribution	Not known (Match of ETC investment value in additional advertising space by Expedia by a ratio of 1:1 - actual value of ETC advertising space not clear from reports – with total ETC Expenditure to being 249,933.	NA		2,150,560	2,150,560
Total partnership value	NA (value not known)	NS	1,276,960	3,778,014	5,054,974

Source: contractors' analysis of the ETC's Final Financial reports, proposals and other ETC reports

5.1.3 *Cost effectiveness, and ROI*

Return on investment (ROI) and cost effectiveness refer to the cost per generated outcome, referring to the net estimated cost per stated outcome. In the case of ROI, also, the extent to which the financial benefit generated outweighed costs (and at what level).

Data to inform such questions are only partially available and does not necessary reflect the principal expected outcome. Data is available for grant 5, the Treasure of Europe Campaign,

[43] DMO of the Piemonte, Toscana, Veneto, and Catalan regions as well as the Regional Council of Lapland.

but in this case, there was no observed net impact on consumer behaviour (despite the intent to generate this change). As such, from a cost-effectiveness point of view the campaign unsuccessful. No data is available for the ECTY grants 6 and 7. While impacts of the year can be quantified, they cannot be attributed to the grant funded activities.

For grant 8, selected data is available for 4 campaigns: Open up to Europe, Europe Invites the Curious; Slow Adventure in the Balkans (US campaign); and Creative Cities of Europe.

With the exception of Open Up to Europe (which was reinforce consumer confidence and stimulating pent-up demand for travel during the summer season of 2021) the main stated aims of the campaigns were not to generate a financial return (i.e. generating buying), but to influence consumers at the dreaming and consideration stage. However, as there is no data on the extent to which there was a net impact on consumers attitudes, costs per net generated attitude change cannot be calculated.

With these limitations the following conclusions may be drawn.

- Measured in terms cost per search generated, and per generated booking, the Open to Europe campaign was by a considerable margin the most cost-efficient campaign. The average cost per search generated was €0.28. the average cost per booking generated was €7.8. This is about 15 times lower than the average cost for the long haul campaigns. ROI – measured as the campaign costs compared to total hotel value of bookings generated – was €1:33.85.
- Other campaigns, had an estimated average cost of €4.40 per search generated and an average of €112.00 per booking generated. There are small differences between the three campaigns – if the cost baseline for "Europe invites the Curious" is that of advertising costs. If the cost of the marketing strategy also is accounted for, then this campaign, by a margin, is the least cost effective campaign. ROI of this campaign range €1.11 to €2.02, depending on the baseline cost which is used.

  Actual cost per search and booking generated by the Europe Invites the Curious campaign can be expected to range between those – accepting that the expenditure category "Content Marketing Programme" used as a baseline for this calculation principally covered Europe Invites the Curious, but also included the European Story Network – and the We are Europe Brand Campaign (both understood to have comparably much lower costs).

Table 11 - Costs, generated outcomes, and ROI

	Target markets	Cost per campaign (€)	Searches	Bookings	Hotel revenue (€)	Cost/ search (€)	Cost/ booking (€)	ROI (hotel bookings)
Open to Europe	EU/8 markets	1,235,960	4,359,099	158,589	41,837,786	0.28	7.79	€ 1: 33.85
Europe Invites the Curious	US	613,611 (ex. content marketing strategy)*	142,344	5,519	1,239,947	4.31	111.18	1: 2.02
		1,115,286 (incl. content marketing strategy)*				7.84	202.08	1:1.11
Slow Adventure in the Balkans	US and Canada	120,000	27,475	1,084	NA	4.37	110.70	NA

	Target markets	Cost per campaign (€)	Searches	Bookings	Hotel revenue (€)	Cost/ search (€)	Cost/ booking (€)	ROI (hotel bookings)
Creative Cities of Europe	US, Canada, and China	155,000	34,094.00	1,357	NA	4.55	114.22	NA

**Cost breakdowns not provided for the Content Marketing Programme – therefore cost data also cover the We are Europe campaign and the European Story Network work. it is understood, however, that the lion's share of costs were associated with the Europe invites the Curious campaign,*

Source: contractors calculations based on the financial reports, and the final reports of the four campaigns

5.1.4 Cost efficiency

Where cost-effectiveness relates to cost per generated outcome, cost efficiency relates to cost per output and result – typically measured in terms of cost per reach/impression (cost per mille, CPM) and costs per engagement (e.g., Cost per video View (CPV) and Cost per Click (CPC)), typically completed by other efficiency measures (such as click through rates (CTR) and View through rates (VTR).

Impressions, without corresponding measurements of engagement and without costs measures, provides no measure of cost-efficiency (or efficiency in general). Advertising impressions is a direct output of funds allocated – with higher funds always generating more impressions. Number of impressions is therefore never an efficiency measure and cannot be benchmarked.

CPM, CPC and CPV needs to be calculated according to industry standards which uses the baseline advertising costs, and not full campaign costs. They can therefore not be calculated, ex-post based on total campaign costs.

There are few measures of cost efficiency across the campaigns and other marketing activity. Most activity provide data on (paid) reach/impressions, but very few provide data CPM data.

Overall, only a single campaign. Open to Europe, provides a measure of CPM (at €5.64). Selected other campaigns provide some indication of CPM, but data is not presented in a way which make data aggregation possible.

None of the paid marketing campaigns provide CPC and CPV data – and this despite the fact paid marketing outreach (most Co-Ops and digital marketing programmes) represents a clear majority of total funding. Further challenges arises from the lack of cost breakdowns for individual lines of action, along with lack of channel breakdown – making any assessment challenging. Cost per participant can be calculated for many B2B actions (FAM and Travel shows), but assessment makes little sense in a context where total funding allocated to such activities represent less than 5% of total budget.

There is more data on CTR and VTR. This has already been presented in section 4 (with further detail in Appendix) and is therefore not repeated here.

5.2 How the ETC's actions compare with similar actions of other NTOs?

Given data availability, it is not possible to benchmark performance of the ETC marketing actions to those of other NTOs. This section, therefore, compare measurement practices.

Compared to the ETC, NTOs place more value on audience measurement, allocate more funds to evaluation and larger internal resources. Measurement under the grants has moved towards industry standards for digital media, but consolidation and insights generated from this data is lacking.

Given the data available, it is not possible to benchmark performance of the funded marketing actions to those of other NTOs. For benchmarks to happen, comparable indicators needs to be populated. Against this backdrop, this section, consider how ETC's actions compare with regard to measurement, and indicators used (considering both NTO feedback and good practice).

There is not a consistent model for campaign measurement across the NTOs which provided inputs into the benchmarking exercise. A common feature, however, is the use of surveys – core to performance measurement. This take the form of brand tracking (brand tracker survey), passengers surveys – and for some additionally, the use of pre-post campaign polling measures. Across interviewees, there is consensus of the importance of attitude measurement, among the target audience, i.e., not only relying on industry measures, or proxy digital measures, but complementing these with perception, as measure of impact.

Digital measures are additional hereto – covering industry standards impressions, unique reach, click-throughs, social media engagement. These are agreed up front with contractors, ensuring their population. Additionally, brand touchpoint modelling[44] is used by some, although this is difficult with the data available and seen as less relevant. When considering, resource, analytics, and metrics, and using grant 8 as the benchmark, the following differences may be observed.

Figure 10 - Measurement ETC and comparators

	ETC	Examples from comparators
Outcome measurement: awareness and attitudes (main campaign success measure)	• Long haul travel sentiment: intent, barriers/motivators and criteria for choosing destination/ interest in chosen themes, product sentiment • Proxy measures: bookings and social media conversation: Conversation pulse, focus, and topic tonality; • Digital behavior: searches related to Passion Communities	• Awareness and attitudes, measured via brand surveys, • Panel surveys, and/or pre-post campaign polling to measure to awareness and impact on perception (emotional engagement)
Outputs and results of digital outreach	• Industry standards (but not aways consistency measured)	• Industry standards • Influencers also
Cost efficiency	• No cost efficiency measures	• Industry standards efficiency metrics.
Budget spent on evaluation	• Fairly low budgetary spend on evaluation	• Budget share on evaluation can be up to 5% - with higher campaign costs associated with lower evaluation campaign cost (typically because survey costs are lower)
Analytics	• Judging from documentation: externalised.	• Internal analytics team and bespoke dashboards
ROI	• No ROI	• UK: ROI is assessed based on the organisation's total grant, not just the media spend, and this is assessed as approximately 20:1.

Source: NTO interviews and ETC reporting

[44] A touchpoint is any interaction (including encounters where there is no physical interaction) that might alter the way that a customer feels about a product, brand, business, or service. As consumers move through the phases that lead them to choose a brand and become loyal customers, the journey has five stages: awareness, consideration, decision, action, and loyalty (retention and advocacy).

6 Coherence and added value

This section addresses the evaluation questions related to coherence and added value. The terms of references define five questions to be addressed under these themes:

- To what extent is this intervention coherent with other interventions which have similar objectives?
- To what extent is the intervention coherent with wider EU policies?
- What is the additional value resulting from the EU intervention(s), compared to what could reasonably have been expected from Member States acting at national and/or regional levels?
- What would be the most likely consequences of stopping or withdrawing the existing EU intervention?
- What is the visibility of the EU's financial support and involvement in the intervention?

6.1 To what extent is this intervention coherent with other interventions which have similar objectives?

Coherence with EU Tourism Policy Overall, there is close alignment between the grants (their objectives, and actions) and the priorities and actions listed in the 2010 Commission Communication, and ECTY priorities. Where weaknesses in coherence may be identified, they relate branding and limited focus on sustainable tourism.

Coherence with other EU funded interventions. There is evidence that some of the different tourism related interventions funded under COSME have been working in conjunction, with actions under the ETC grants, However, there is no evidence to suggest that ETC grants operated in synergy with funded projects which aimed to develop trans-European routes and tourism products. The likely reason is that the ETC action build on NTOs/DMO expressed interest, and willingness to co-fund.

Many other (significantly larger) EU funding mechanisms provide funding to tourism promotion. While assessment of coherence with these initiatives is out of scope. There is nothing to suggest that such activities overlap with those funded under ETC grants. However, because grant 8 initiated promotional activities targeting European markets, in the context of the pandemic, the potential for overlap significantly increased.

6.1.1 Coherence with EU Tourism Policy

The grants under this evaluation, are guided by the 2010 Commission Communication "*Europe, the world's No. 1 tourist destination*". The Communication outlined a new coordinated approach for tourism-related initiatives and a new framework, identifying a set of EU-led actions articulated under four priorities:

- Stimulate competitiveness in the European tourism sector
- Promote the development of sustainable, responsible, and high-quality tourism
- Consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations; and
- Maximise the potential of EU financial policies and instruments for developing tourism.

Of these, the priority "*Consolidate the image and profile of Europe as a collection of sustainable and high-quality tourist destinations*" aims at stimulating tourist demand for Europe.

In 2015, the tourism priorities – though not the strategy itself – was revised.[45] Among the four priorities set out in 2015 feature *joint promotion, particularly towards key third countries and internationalisation*. Other elements of the policy framework includes the 2014 European Parliament report on new challenges and concepts for the promotion of tourism in Europe.[46] which, among other encouraged the Commission, in cooperation with the ETC to deepen the promotion of Europe as the world's top tourist destination under the umbrella of a common European approach and encouraged the creation of a "Destination(s) Europe" brand with the aim of complementing and enhancing the promotional activities of NTOs and DMOs for the benefit of the visibility and competitiveness of European tourist destinations, especially in long-haul markets.

When considering these priorities it may be concluded that there is close alignment between the communication and the grants, not only with regard to main priorities, but also, with respect planned actions listed in the 2010 Communication.[47] Similar observations may be made for the EC-ETC Joint Declaration on cooperation in the field of tourism which set out the six areas of collaboration.[48] As such, the grants have been instrumental in delivering on the EC's Communication and the Joint Declaration.

Where weaknesses in coherence may be identified these relate to:

- Lack of full development of a "Europe brand". While actions under grant 5 developed the common visual identity, used for subsequent grants, the actual development of a true branding strategy, was not delivered (though elements are delivered under grant 8 – see also section 3). A contributing factor is likely to be requirements set out for grant 5, which, while requesting the development of a "distinctive image which differentiates 'Destination Europe' from other international regions" also requested that the ETC should seek to capitalise on the logo and communication slogans developed in the context of the Commission's communication campaign "Europe, whenever you are ready" – suggesting that the application of the logo and slogans, would constitute the brand.
- Sustainable tourism. While sustainable tourism, is implicit in the work undertaken it is not an explicit feature, and is overall inadequately addressed in the calls, the marketing actions, the design of the campaigns undertaken and in the selection criteria for participation.

Alignment with the objectives and priorities set for the ECTY2018. Agreed in 2016, the EU-China Tourism Year (ECTY2018), was seen, from a European perspective, as an opportunity to attract more Chinese tourists, develop EU investment in China and enhance cultural understanding. The year had four objectives:[49]

- Promoting lesser-known destinations
- Improving travel and tourism experiences
- Providing opportunities to increase economic cooperation

[45] Court of Auditors (2021) EU Support to tourism Need for a fresh strategic orientation and a better funding approach, Special report
[46] 2014/2241(INI)
[47] The actions are a) Create a true "Europe brand" in cooperation with the Member States to complement promotional efforts at national and regional level and enable European destinations to distinguish themselves from other international destinations. B) Promote the visiteurope.com website in order to increase the attractiveness of Europe as a collection of sustainable and high-quality tourist destinations, particularly among emerging countries. C) Encourage joint promotional actions at major international events or large-scale tourism fairs and exhibitions.
[48] 1) Promotion of Europe as a destination in long-haul markets 2) Development of pan-European routes/itineraries and tourism products 3) Collaboration on digital marketing activities 4) Destination Europe brand 5) Joint event presence and 6) Research and marketing.
[49] https://ecty2018.org/

- Creating an incentive to make quick progress on EU-China visa facilitation and air connectivity

Actions funded under grants fits withs with these lines of priorities, and particular within the aim to attract more Chinese tourists. The promotion of lesser-known destinations is understood to be more of an implicit than explicit aim. The ETC proposal, only mention lesser-known destinations in the framework of the ECTY web content. Co-Op calls for proposals do not mention lesser-known destinations in the award criteria. However, they were to support marketing of European and trans-European products linked to cultural tourism, gastronomy, natural heritage, coastal and maritime tourism, shopping, and trans-national routes which may be understood as lesser-known destinations.

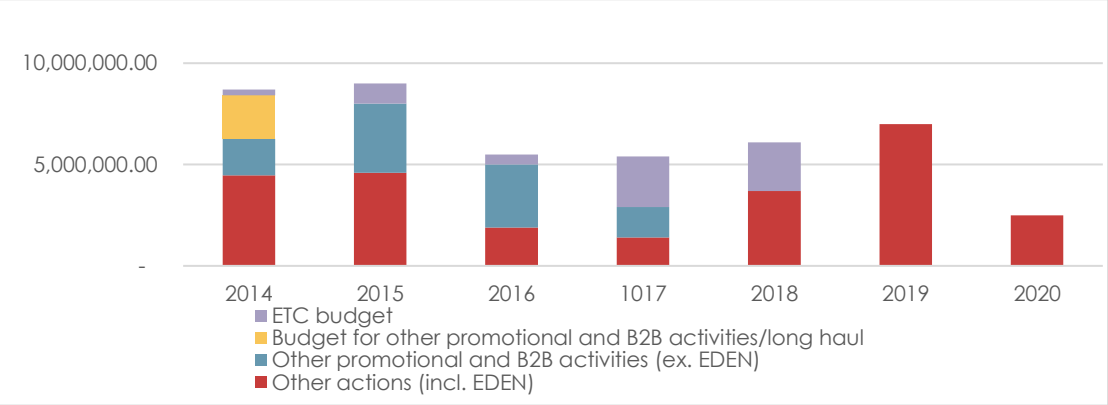
6.1.2 *Coherence with EU funded interventions*

Other (significantly larger) EU funding mechanisms provides funding to tourism development and promotion.[50] Assessment of coherence with these initiatives is out of scope. There is, however, nothing to suggest that such mechanisms he specific focus on marketing of European destinations in long haul markets. In contrast, promotion of destinations form part tourism development, especially under the ESIF. Some €2.4bn was allocated to Development and promotion of tourism potential of natural areas, public tourism assets and public tourism services under the ESIF in the 2014–2018 period.[51]

In the reference period (EC work programmes 2015–2020) a total of €35.5m has been allocated to tourism-related activities under COSME. 18% of that funding has been allocated to ETC grants. The share increased significantly between the early WPs (ranging 9–11% under the 2015–2016 WPs) to the latter WPs (2017–2018), where the share ranged from 39% to 46%.

Other grants covering or involving promotion of tourism destinations (EDEN excluded and B2B partnering included), represented in the same period 23% of tourism related COSME funds. However, the share decreased in the reference period. By 2018, the only promotional activity funded (besides EDEN) was the ETC grant.

Figure 11 - COSME WPs budget allocation to different actions



Source: COSME annual Work programmes 2014–2020 (annex)

[50] See for example the European Commission (2021) Guide on EU funding for tourism
[51] Ecorys (2018) Study on the Contribution of Tourism to Local and Regional Development - Evidence from the European Structural and Investment Funds 2012-2018 for the European Commission, DG GROW

Due to the timing of the evaluation, and the fact that other similar intervention mostly were funded during the 2016–2017 period, it is difficult to assess coherence comprehensively. However, the following observations should be noted.

Synergy of interventions There is evidence that (some) of the different tourism related interventions funded under COSME have been working in conjunction, with actions under the ETC grants either supporting or using results from other interventions. Notable examples includes:

- Integration, and use of the "Europe" logo developed under the COSME funded campaign "Europe, whenever you are ready" as the visual identify of marking activity
- Coordination role of the ETC in relation to the implementation of the ECTY, where the ETC delivered a number of actions, with the aim to ensure synergy among different interventions. This included the management and contents generation of the ECTY website. Intended as a supporting toolkit, the website was to assist European private and public stakeholders to prepare for and benefit from the ECTY. By design, Grant 7 was furthermore to build synergy with other funded actions (2018 European Year for Cultural Heritage, World Bridge Tourism Pilot Action, and the B2B matchmaking programme (10 events) intended to support the internationalisation of EU tourism operators – and funded under the COSME WP 2016 though call for tenders.
- Coordination of resources, with Grants 7 and 8 benefiting from a pooling of resources, from different EU funding mechanisms – including not just the COSME budget but also resources from the other funding mechanisms (EU general budget, the EMFF WP)
- Promotion of EDEN destinations by the ETC, with a dedicated subsection on the Visit Europe website.

In contrast, there is no evidence to suggest that ETC grants were coordinated, or operated in synergy with COSME funded projects which aimed to develop trans-European routes and tourism products, in the reference period – and which, as such could have been promoted in the context of the campaigns led by the ETC. The likely reason is that of different operations, where the ETC build on NTOs and (principally national) DMOs expressed interest, and willingness to co-fund.

Overlap. Overall there is overall nothing to suggest that the activities which have been funded under the COSME programme, has been clearly overlapping. While COSME has funded promotional activities other than those funded under the ETC grants, they have aimed at different audiences (typically European) or, in the case of the ECTY coordination has been envisaged at the outset.

However, because Grant 8 initiated promotional activities targeting European markets, in the context of the pandemic, the potential for overlap, and the need for coordination increased. In the 2020-2021 period the European Commission initiated various campaigns and initiatives to ease the economic impact of the measures taken to contain the coronavirus outbreak. These included notably:

- The 2020 social media campaign focusing on sustainable cultural tourism, Europe's Culture – close to you,[52] which was to promote the re-discovery of Europe's diverse treasures, both natural and cultural. The aim was to encourage Europeans to discover the beauty and richness of destinations close to their homes, in a safe and sustainable way.
- The 2021 year of European Rail which focused on this specific travel mode to promote intra-EU tourism

[52] See https://culture.ec.europa.eu/news/europes-culture-close-to-you

There is nothing to suggest that the campaigns and other marketing activities have been tailored or coordinated with these activities.

6.1.3 *Coherence with national marketing approaches*

The issue of relevance and coherence with national approaches is covered in section 3.

6.2 To what extent is the intervention coherent with wider EU policies?

Ensuring environmental and social sustainability of tourism, is a top priority area, in the Commission's report *Transition pathway for tourism, and reflects wider EU policy priorities.* Environmental and social sustainability overall is of secondary importance, though elements of the outreach strategy support the promotion of sustainable tourism

A cocreation process[53] with industry, public authorities, social partners, and other stakeholders was initiated in June 2021: and led to the publication of the Transition Pathway for tourism[54] in February 2022.

This report presents ambitions and desired objectives together with a set of actions for transition of the tourism sector, with a focus on environmental and social sustainability of tourism – in addition to economic sustainability and digital transition. The report highlights the need to match consumer expectations as regards sustainability, and underlines the needs for sustainable transport, circularity of tourism services, and green and digital transition of tourism companies (Twin transition).

Against this benchmark, the grants (as considered in terms of focus and priority) is somewhat mixed. On the positive side, elements of the outreach strategy supports the promotion of environmental and/or social sustainable tourism – such as:

- The focus on lesser-known destinations, across grants
- Thematical focus – in particular the priority Slow Adventure, under Grant 8
- Focus of some of the Co-Ops promoting sustainable transport modes (train) or "slow travel"

However, if one consider the overall approach and priories set for four grants, it may be concluded that environmentally sustainable tourism has not been a key focus area. This point has also been highlighted by national stakeholders which, as outlined have called for a stronger focus on "Europe as a sustainable tourism destination" going forward. This finding may also be illustrated by the call for proposals, the ETC proposals themselves and the requirements laid down by the ETC calls which aimed to generate Co-Ops.

The first three calls and the corresponding grants did not mention questions of sustainable tourism or promotion of sustainable or environmentally friendly destinations. References are found to sustainable tourism are found in the 2018 call and in the corresponding proposal. Reflecting the ETC Horizon 2022 strategy, the Grant 8 proposal touches upon issues related to sustainable tourism and highlight for the first time the objective to "maintain its market share" as opposed to an increase and the aim to disperse (in terms of geography and seasons) tourism visits. More focus is also given to environmental practices in the selection of themes, with the "Slow Adventure" theme aiming to focus on destinations with clean environments, unbuilt landscapes, and quietness. However, this does not translate into any requirements as regards

[53] Commission staff working document, Scenarios towards co-creation of transition pathway for tourism for a more resilient, innovative and sustainable ecosystem, Brussels, 21.6.2021

[54] European Commission (2022) Transition pathway for tourism

the nature of Destinations to be promoted - as defined in the eligibility or quality criteria. As such environmental and social sustainability of tourism appear overall to have been of more secondary importance to the grants.

6.3 What is the additional value resulting from the EU intervention(s), compared to what could reasonably have been expected from Member States acting at national and/or regional levels?

EU grant funding represents only a fraction of the funding across Europe which is spent on promotion of European destinations – but represents the bulk of public funding spend on promotion of "Destination Europe" and promotion of transborder destinations in long haul markets. Co-funding opportunities provide an incentive to collaborate on campaigns and other marketing actions, and cover costs associated to their design and delivery. It is unlikely that NTOs would join forces for international marketing collaboration under a common identity if EU funds were not available.

It cannot be evidenced that European campaigns, are more efficient or effective than national campaigns. As such, the measurable added value is principally qualitative. This is directly associated with benefits of the marketing actions themselves, complementing NTO and DMO actions, the structuring effect of the grants, especially as regards the ECTY – and indirectly, learning and sharing. Marketing in long haul markets also allows especially emerging destinations to test and develop new markets, at lower costs – providing a presence and contacts. The more strategic impact on marketing and branding as undertaken by NTOs and DMOs is modest.

6.3.1 Overall assessment of added value

The funding mechanism, and the association grants subject to this evaluation, are intended to support the 2010 European strategy for tourism, and specifically to:

- Encourage a coordinated approach for tourism related initiatives
- Consolidate the image and profile of Europe as a collection of sustainable and high-quality tourist destinations'

In quantitative terms, the funding which has been made available under the four grants represents only a fraction of the funding which across Europe is spend on branding promotion of destinations, at national, regional, and local levels – and among public and private sector actors. As such, EU funding in quantitative terms, contribute only modestly the total resource spend on international tourism marking.

In contrast, the EU funding subject to this evaluation, represent, in the study reference period, the bulk of public funding spend on promotion of Destination Europe or more generally, marketing of transborder or European destinations – especially as regards promotion in long haul markets.

There is nothing to suggest that NTOs would join forces for international marketing collaboration under a common identity if EU funds were not made available. Consulted NTOs note that while marketing of Destination Europe is key, it is unlikely to take place without funding. Co-funding opportunities provide an incentive to collaborate on campaigns and other marketing actions. It also allows to cover the (additional) resources/costs, associated with collaboration to individual NTOs/DMOs. Without funding, interviewees note, there is no incentive but also no management will, accepting that national NTO funds are "earmarked" to marketing of a specific country. As such it is questionable if the Co-Op approach is sustainable without (continued) EU funding.

Due to the lack of benchmarkable data and generally only partial performance data, it is not possible to assess if EU funded campaigns have been more effective or efficient than comparable campaigns. Where data is available, there is, in some cases evidence of positive

impacts on consumer behaviour of individual sub campaigns (with purchasing value largely outweighing campaign costs). Evidence available also suggests that marketing efforts in some cases have helped generating increases in tourism visits and spend (ECTY). However, performance results are for several campaigns somewhat mixed, especially as regards consumer attitudes, which is the focus are of many campaigns. Further challenges arises from the fact that consumer attitudes will be (positively or negatively) impacted by many other factors, including NTO campaigning work.

Put differently, the added value of the resulting from the EU intervention, which can be directly observed relates chiefly relates to:

- The nature of the activities which are funded – and specifically, the promotion of Destination Europe, over and above the marketing of individual destinations and countries in Europe
- The added value that these marketing activities bring to participating NTOs and DMOs, by complementing their marketing efforts.
- The structuring effect – specifically as regards the ECTY, where funding allowed for the implementation of an overarching strategy, and common identity, which could not have been delivered by individual Member States.

In addition to these benefits, funding generates indirect added value, by supporting

- **Learning and sharing**. EU funding supports, via collaborative campaigns and other marketing activity, but also via other associated activities (e.g. design of the marketing strategy Horizon 2022 and follow up campaigns), a framework of collaboration and exchange between NTOs and other partners. While NTO collaboration is supported via the ETC's own activity (i.e. that funded by the NTOs which are members of the of the ETC), EU funding provides support for wider and better sustained collaboration.
- **Convergence**. While there is little evidence that the programmes of EU co-funded marketing actions, have generated consolidated branding of destination Europe, outside of EU funded marketing actions, learning and sharing between partners, can be expected to support, gradually, greater convergence of NTO and DMO marketing activities.

Judging by the interview results, this complementarity and added value is overall stronger for marketing in long haul markets, as originally envisaged by the funding mechanism. While the is widespread interest in funding for marketing within European markets (especially among DMOs, but also among several of the NTOs consulted), marketing actions in long haul markets:

- Allows, especially emerging destinations to test and develop new markets, at lower costs, while benefiting from the ETC network and services (low entry costs)
- Support the development of common transnational tourism offers.
- Provides, especially emerging destinations and other destinations without presence in long hauls markets, with B2B access
- Provides greater potential for synergy between destinations, accepting that long haul visitors are likely to embark on multi-country visits.

In contrast DMOs, and especially NTOs, will more naturally be competitors in European markets, decreasing potential benefits and motivation for collaboration. Additionally, higher shares of national funding will, due to the potential markets be channelled to the European market.

While the added value of EU funds in strong, the more strategic impact on marketing, as undertaken by NTOs and DMOs modest. While common themes are seen as bringing a level of consistency to the EU co-funded marketing actions, there is little to suggest that the EU funded actions had nudged a change towards a more consistent European branding, over and above the ETC-led marketing actions. Where such effects may arise, they are more the result

of strategic exchanges between NTOs in the context of ETC strategy development, and less the result of participation in collaborative marketing actions.

Some interviewees note that there are challenges with developing a European brand, which is sufficiently specific and which provides unique propositions which are "sellable". In this context, some interviewees called for more work to support the promotion of transborder destinations – not just focusing marketing on "the dreaming stage", but also develop campaign actions which also support the pre-booking stage of the customer journey.

6.3.2 Relative added value

While marketing programmes and campaigns are assessed positively, there are marked differences in the perception of the added value of these activities - when comparing to the actions already undertaken by NTOs. This is true for both B2B and B2C targeted programmes, though there are differences B2B and B2C actions.

EU grant funded B2B actions and programmes, are seen as key to NTOs in Member States, with less developed marking structures ("Emerging Europe"). For these NTOs, ETC organised B2B actions, provide a unique opportunity to gain market access to tour operators and other business partners which otherwise would not have been accessible. ETC-led B2B marketing activities has, in these contexts, also the additional benefit of providing a structure and framework, allowing market exploration at " low costs". As such. ETC B2B marketing actions seen as providing high added value.

In contrast, NTOs stemming from western European countries with more developed marking approaches already have their own networks, and local staff/offices in key third country markets (in some cases organised with neighbouring countries- e.g. Denmark). For this reason, the added value of B2B activities is seen as small (unless ETC-led action are very targeted in certain areas)

Developed NTOs, who already have offices in China or in the US and do not see an added value of B2B activities, unless these are very specific and ETC helps them identify opportunities in certain areas or thematic themes that they were not aware of before. Therefore the lifelikeness of participation in ETC-led B2B activities is low(er) and benefits are seen as (very) small.

Somewhat similar conclusions may be drawn for B2C actions. There are some differences, however. The relevance of collaborative marketing activities targeted B2C is high for NTOs from emerging destinations , largely for the reasons explained above. In addition, they are seen as relevant to other NTOs (often from smaller Member States) as an instrument to develop cross border collaboration and marketing, which would not have been funded without EU match funding.

In contrast, the added value is seen as smaller for NTOS in countries, where the national offer is sufficiently large and diverse, and hence where the need to promote a "transnational offer" is seen as smaller. These results would suggest, in turn, that there are continued benefits with both B2B and B2C activities. B2B is especially seen as valuable if a return to physical B2B is envisaged.

However, EU funding, in its current organisation is unlikely to equally benefit NTOs of different Member States (and other European countries). As such, it can be expected that participation patterns will remain uneven.

6.3.3 *Other benefits*

The tender specifications are clear that assessing EU co-funded research activities are out of scope of the evaluation. However, it should be noted that a key spontaneous benefit of EU grant funding allocated to the ETC is that of research deliverables. Overall, when commenting, many interviewees highlight this particular aspect, and several – especially large NTOs – note that research outputs are one of the prime benefits (or the prime benefit) of EU funding.

Many interviewees also note the added value of other ETC actions, over and above what is funded under the EU grants, supporting the tourism industry, and encountered challenges (the pandemic, Ukrainian war). While these benefits do not directly result from EU funding, the framework which is provided by EU grant funding, can overall be considered to support the ETC actions.

6.4 What would be the most likely consequences of stopping or withdrawing the existing EU intervention?

Should EU funding be withdrawn, it is unlikely that funding will be replaced by other sources, or that NTOs will provide full funding for collaborative marketing activities. Consequently, it could be expected that the collaborative marketing outreach would be discontinued.

EU grant funding to the ETC (and hereby to its members and other NTOs and DMOs) may chiefly be considered an opportunity for co-funding for the design and implementation collaborative marking activities targeted (chiefly) long haul markets.

Should EU funding be withdrawn, it is unlikely that funding will be replaced by other sources. While NTOs and DMOs often have significant resources at their disposal, there is no evidence that NTOs use or have used such resources, on collaborative marketing activities outside the scope of EU funded outreach activities. Additionally, there is consensus that the collaborative activities co-funded under EU grants require resources for design and collaboration, for which DMOs and NTOs have no funds. As such, likely direct consequences would relate to:

- Discontinuation of collaborative marketing outreach, promoting Europe as a destination in (long haul) markets. While promotional of European destinations in long haul (and other) markets would continue promotion would likely exclusively be designed and implemented by, chiefly, NTOs.
- Discontinuation of "existing resources" within the ETC i.e. a structure and set up, available, at short notice to directly support the European Commission, should it wish to develop initiatives similar to the ECTY going forward. Discontinuation of funds can be expected to go in pair with likely dismantling of the ETC sections relative to marketing of Destination Europe. While support can be bought in other forms (through contracting, or via calls for proposals), an already existing non-for-profit structure with processes in place and with the dedicated aim to strengthen the sustainable development of Europe as a tourist destination., is likely to be more efficient, flexible towards the EU's demands and expectations and having a shorter turnaround time.

Additionally, while outside of scope of this study, discontinuation would imply less resource availability for ETC-led research with likely discontinuation of some of the ETC research studies (travel barometers especially but also other pieces of research and insight as produced under the grants).

Discontinuation of collaborative marketing outreach is likely, in addition, to have various add-on or resulting effects, which stem from the processes involved with the delivery of the EU funded marketing campaigns and other co-funded activities or the benefits associated with the deliveries. These knock-on effects mirror the results presented in the previous section, with negative effects on learning and sharing between NTOs (and DMOs); convergence and

campaign design and implementation (especially for DMOs which are more inclined to draw ETC lead research)

Again mirroring the above results, overall study results suggests that such consequences would be relatively more felt by emerging national destination and other destinations with low(er) resource availability, including those with no physical presence in long haul markets.

6.5 What is the visibility of the EU's financial support and involvement in the intervention?

Overall EU's financial support and involvement (as presented in the use of the EU flag, and mentions of EU co-funding), enjoys good visibility in the actions under the 4 grants. The lion share of products contain EU references. Besides selected Co-Ops under grant 7 there no evidence that EU visibility requirements have been disregarded. EU visibility is generally on pair with the usage of other logos.

In order to assess the visibility of the EU's financial support and involvement in the intervention, a sample of 80 products from the activities funded by the four ETC grants was extracted. A diverse sample of products,[55] was included. To the extent possible, at least one item for each of the major activities were extracted.

Of the products sampled, a clear majority contained reference to the EU (70%). Most included the EU flag. There are generally explicit mentions of EU funding. Half of the items mapped which did not include the EU flag regarded social media posts. Due to their nature (native adverting and boosted posts) they would usually not include such reference. Other social and digital media content (digital banners and lightboxes) generally include mention of EU funding and the EU flag, as does most:

- Videos (for digital promotion and TV promotion)
- APM stories and
- (We Chat) mini programmes
- Campaign specific websites

Similarly, the EU flag (along with mention of EU co-funding), is generally visible on content produced for physical events, such as tourism fairs and physical events organised in the framework of the ECTY (e.g., outdoor banners and rollups).

A share of other items (14% of total) however, also did not include EU references. These items stem largely from the first three grants. Judging by the sample reviewed, there has been systematic referencing to EU funding under the most recent Grant (grant 8). A possible contributing factor is the centralisation of contracting under ETC responsibility.

There are no clear trends in items which appear not to mention EU funding. However, it may be observed that EU visibility often is lacking for content produced under selected Co-Ops funded under grant 7. Specifically, among the content for the Co-Ops involving Eurorail (European world heritage journeys with EURAIL and Meet Dutch and Flemish Masters by Eurail) systematic EU funding visibility appear to be lacking. There is no other evidence of systematic lack of visibility.

Where the EU flag (and referencing to EU funding is) included, visibility is generally on pair with the usage of other logos/identities. There is nothing to suggest that logos or visual identities of other co-funding organisations enjoy greater prominence in consumer or travel trade outreach at the detriment of the EU flag, and co-funding mention. Accepting however, that multiple

[55] year of grant, year of implementation, type of content, audiences and markets were considered

organisations may provide funding several logos may be present, which, collectively may outweigh the EU flag. This may especially be observed in "partner led" Co-Ops, whereas EU visibility tends to outweigh national partner visibility (typically because only the "Europe" visual identify and EU funding mention is present).

The developed visual identifies and logos (the "Europe" visual identity and the ECTY logo), in contrast, usually enjoy greater prominence.

7 Conclusions and recommendations

7.1 Relevance and consistency with the 2010 EU tourism strategy

With the aim to consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations, the ETC has since 2012 received EU co-financing in the form of ad-hoc grants for the implementation of a programme of promotional actions. Objectives of the four grants have been shaped by the priorities of the 2010 tourism strategy and the objectives of the 2018 EU-China Tourism Year. There is close alignment between these and the objectives set out for the four grants subject to this evaluation (calls and corresponding ETC proposals).

Grants have been strategically driven by the two ETC strategies: Destination Europe 2020 and later, the Horizon 2022 strategy, as well as by objectives and requirements laid down in the EC calls. While overarching objectives have not changed fundamentally, over the span of the different grants, Horizon 2022 has aimed to transition ETC-led marketing actions towards a new global thematic promotional approach.

The current framework, it main aims, combined with the objectives, principally as outlined in the ETC Horizon 2022 Strategy has globally been appropriate to steer marketing actions. The strategy's focus on free independent travellers and on niche marketing articulated around selected marketing themes is generally assessed positively and is line with current destination branding trends and approaches of NTOs. The themes which were selected under the 2019 grant have been suitable and sufficiently wide to encompass NTOs national branding themes – though a more explicit focus on "Europe as a sustainable tourism destination" is necessary going forward (along with consideration to emerging travel themes – see section 3.2.2).

There is broad consensus on a continued need for EU funding to support the branding of Destination Europe in long haul markets. Awareness of Europe's destinations and unique selling points remains inadequate and European marketing actions adds value and complements, NTOs marketing efforts. There is broad consensus of the suitability of the ETC to lead marketing of Destination Europe and consequently to continue earmarked funds.

Going forward it is recommended to take the following aspects into account:

Funding. Interviewees note the inadequacy of EU ad hoc grants to deliver on stated objectives. While budgetary increases ultimately is a policy decision, the vision and strategy laid down in the Horizon 2022 strategy assumes a larger budget than currently allocated. A larger budget would also be necessary prerequisite to generate more widespread participation and a structuring impact on actions funded outside the remit of actions implemented under EU funding. A structuring impact (where European destinations increasingly associate themselves with specific brand assets and attributes of destination Europe), however, cannot be assumed simply by allocating larger funding envelopes.

Objective setting. If the current framework is overall suitable, moving from vision and strategy to the definition of specific and measurable outcome objectives, (SMART objectives) for specific campaigns has been weak.

Objectives defined in the calls and proposals, mostly combine broad aims, with relatively operational objectives linked to the production of deliverables. There is a need to revisit objective setting, in line with good practice, to ensure that outcome focused objectives are

defined – and measured accordingly. Accepting that there is likely to be a short turnaround time between the call for proposals and the ETC response, there would be benefit in considering a level of reporting, in between proposals and start of implementation reporting where campaign designs, specific objectives and KPIs are detailed. There are various planning resources available online[56] and also templates for performance measurement planning and reporting.[57] The UNWTO and ETC funded report[58] Handbook on Key Performance Indicators for Tourism Marketing Evaluation also provides relevant guidance.

Changes in travel and tourism behaviour Covid-19 has meant changes in travel and tourism behaviour. This, including changes in NTO response, will have an impact and should be considered when defining Destination Europe branding, marketing, and promotional strategy in the short and medium term. This includes strategic consideration to if, and to what extent, joint promotion should continue to cover intra-European promotion. Whilst the increase of intra-European and domestic tourism during the pandemic is expected to grow in the post-pandemic area, long haul travel is expected to return only gradually – providing the basis for additional focus on promoting "intra-European" tourism. At the same time NTOs will more naturally be competitors in European markets, decreasing potential benefits and motivation for collaboration.

Brand strategy European Destination branding has been a priority for the grants overall, as highlighted in the 2010 Communication. Various streams of work has aimed at addressing this priority. However, a comprehensive long-term branding strategy is still to materialise. Such as strategy would go beyond the visual identify and beyond specific campaigns, englobing all campaign work under the grants and operating as distinctive "umbrella" brand value proposition for Destination Europe). .

Some key success factors to be considered in the brand design and brand building process are:

- Consider brand as key strategic tool and asset (not simply a logo, a slogan, or a campaign) for sustainable competitiveness and development of destination Europe
- Building a destination brand is first about defining the vision and desired identity and image we want for Europe as a tourism destination. Second, it is about designing and effectively implementing the right set and mix of strategies, ideas, projects, actions, investments, and communications in a coherent and consistent way over time in order to build that vision and image
- Brand design and brand building is a collective process that should involve and engage all destination key tourism stakeholders and the European population
- Brand design go hand in hand with proper brand research, brand management and monitoring – and resources needs to be allocated accordingly

To date the ad hoc grants, have been heavily concentrated on marketing actions. If EU funding is to meets its objectives to promote a "brand Europe", there would be benefits in allocating earmarked resources, to the development of a Europe brand strategy (its design, and its monitoring, working in partnership with the ETC's members and other European NTOs).

Work on Europe brand strategy, furthermore, needs consider the following aspects.

Branding imperatives:

- It is based in Europe's tourism development vision and strategy.

[56] E.g. the UK OASIS planning framework at https://gcs.civilservice.gov.uk/guidance/marketing/delivering-government-campaigns/guide-to-campaign-planning-oasis/#OASIS-framework

[57] E.g. see the UK's Dashboard reporting indicator and reporting template GCS Evaluation Framework 2.0

[58] World Tourism Organization and European Travel Commission (2017) **Handbook on Key Performance Indicators for Tourism Marketing Evaluation**

- It is aligned with and responds to the key trends and the potential changes in tourism and travel behaviour both internationally and within Europe, in the post-covid era.
- It clearly differentiates Europe from other competing destinations, identifying and highlighting the distinctive identity and the unique brand attributes and assets of Europe as a tourist destination.
- It generates and creates awareness, understanding, attractiveness and preference among potential visitors.
- It is clear, differentiated, relevant, credible, memorable, and sustainable over time.
- It establishes some kind of lasting emotional connection with its target audiences (international and domestic).
- It works both for the international as well as for the domestic market.
- It takes into consideration and works for all Europe's key strategic tourism content pillars, themes, assets, and destinations (umbrella destination brand).
- It serves both for the reopening phase ('short-term') as well as for the sustainable development of tourism in Europe in the medium and longer terms.
- It is able to involve and engage the key European tourism industry stakeholders, both public and private, as well as the European citizens, building identification, pride, and sense of belonging among them.

7.2 Participation

Collaborative marketing campaigns, as an approach is seen as suitable. EU co-funding provides the incentive. However, few applications for Co-Ops have been submitted by NTOs and/or DMOs. In contrast, ETC-led Co-Ops have generated widespread participation, driving up NTO/DMO participation numbers under Grant 8.

There is a concentration of participation in Co-Ops, from countries with high number of international tourist arrivals, and correspondingly lower participation from emerging destinations (especially in partner led Co-Ops). Emerging destinations in contrast, participate more in other actions (trade fairs, familiarisation trips etc.) suggesting different patterns of relevance. Participation to Co-Ops is positively associated to:

- Alignment between Co-Op priorities and the NTO/DMO strategy
- Pre-existing contacts or collaboration with other NTOs/DMOs (Co-Op proposals build on these pre-existing contacts)
- Low entry costs (the case for the ETC led Co-Ops)
- Smaller national destinations

Factors hampering participation relate especially to visibility/awareness (especially for DMOs), administrative burden, participation costs, and timelines.

Going forward it is recommended to take the following aspects into account:

- "Partner led" and ETC-led Co-Ops, cater for different groups, with different advantages of different models (see main report). If the objective is to maximise participation, then the double offer of ETC led Co-Ops and partner led Co-Ops appears necessary
- To maximise participation, longer term planning and early communication is necessary. Time is needed not just for campaign planning but also to ensure management support within the NTOs – accepting that NTO budgets are often allocated long in advance. This in turn would call for longer EC grant periods – and if not possible – forward planning with the ETC and EC is necessary, along with "early warning" of NTOs and DMOs
- To maximise participation in "partner led" Co-Ops, early warning/information and support to partnership building would be beneficial – i.e. proactively supporting NTOs and DMOs, in identifying partners interested in developing common campaigns under an agreed theme, well before planned calls. This may involve early identification of potential applicants and sharing contacts (e.g. in the form of a database with contacts to potentially interested organisations, and past participants). However, there will be structural limits in terms of NTO

and especially DMO participation. The levels of participation seen under the 2019 grant cannot be assumed going forward

- The Co-Op model implemented under Grant 8 does not appear an unreasonable burden (in terms of planning, implementation, and reporting). The practice where contractual aspects and tendering is managed by the ETC should be maintained as it eases the management burden
- A 50% co-funding rate (requested to participating NTOs/DMOs) is widely considered suitable, and in line with standards use elsewhere (e.g. USA). While a marginally higher co-funding rate would still maintain interest, significantly higher requirements for co-funding would likely go hand in hand with decreased participation

7.3 Effectiveness

Overall performance Overall the data available on the performance, effects, and effectiveness of the EU-funded activities to promote Europe on long haul markets (and/or intra-EU tourism), does not provide comprehensive evidence to assess – across grants – if the actions improved Destination Europe's image and attractiveness and increased visits.

However, the data available, suggests that the activities in the main have met (and often exceeded) the set output and results targets for the actions (whenever these were measured). There is also evidence to suggest that several campaigns have improved Destination Europe's image and attractiveness and/or have generated increased bookings and visits. When considering engagement, conversation, and bookings there are a number of very well performing campaigns within the portfolio of actions - including several of the recent campaigns (e.g. Open Up to Europe, Europe invites the Curious).

It is also reasonable to conclude that the campaigns and marketing actions implemented within the framework of the ECTY, have contributed to the significant Year on Year (YoY) increases in tourism visits from China, pre-pandemic. Less positively, the first pilot campaign implemented (Treasures of Europe campaign) was unsuccessful, when considering stated objectives (though, as a test of PPP, it can be considered as having provided valuable insight into subsequent design).

Delivery and partner feedback. The quality of the marketing design is seen as good. There is, in general, satisfaction with achievements (as known) delivered by the marketing actions and processes. The ETC is perceived as supporting process and implementation well. Weaknesses in design are (when noted) more related to the number of activities (too many small sub-campaigns and dispersed activities)

Going forward it is recommended to take the following aspects into account:

- While measurement is a focus area and progress may be observed between different grants, there is no consistent improvement over time. There is scope for improvement with regard to measurement and evaluation. This applies to the measurement itself (including definition of baselines and KPIs) and the consolidation, analysis, and presentation of data. Reporting data under the different grants currently require significant efforts, to consolidate available evidence of performance
- High quality performance monitoring requires the adequate human and financial resources, this aspect needs to be considered when drafting subsequent call for proposals.

7.4 Efficiency

Due to lack of data it is not possible to assess overall cost-efficiency of the campaigns and marketing programmes undertaken.

The data available, however, shows that the largest single campaign which has operated under the Grant 8 "Open to Europe", has been cost-efficient, in terms of generating, searches, booking and hotel revenue. Other campaigns (for which there is data) have been less efficient with regard to these criteria (and in one case inefficient). Most of the other campaigns, however, had other aims than generating direct conversion. Additionally, most of the campaigns were undertaken in long haul markets in the context of the pandemic.

Changes in implementation design, has led to increased 3rd party contribution, contributing to the overall efficiency of the ad hoc grants.

Going forward it is recommended to take into account the following aspects:

- If cost-efficiency and cost-effectiveness measurement is to be a priority going forward, implementation of appropriate metrics and measurement must be considered and prioritiitised
- Reporting of financial data also needs review, so that costing of different lines of actions becomes more readable

7.5 Coherence

Other EU funding mechanisms Along with the COSME programme, many other (significantly larger) EU funding mechanisms provide funding to tourism promotion. There is nothing to suggest that ETC activities have been clearly overlapping with those.

ETC Grants, in some cases, have operated in synergy with other COSME funded tourism initiatives.[59] However, this does not appear the case with COSME funded projects which aimed to develop trans-European routes and tourism products. Similarly, there is no evidence that Grant 8 campaigns, targeted European markets, have been designed in conjunction with other EU funded tourism campaigns targeting the European markets. The likely reason is that the ETC action build on NTOs/DMO expressed interest and willingness to co-fund.

Post-2020 EU tourism priorities. Ensuring environmental and social sustainability of tourism, is a top priority area going forward. Environmental and social sustainability overall is of secondary importance of these past grant activities, though elements of the outreach strategies support the promotion sustainable tourism.

Going forward it is recommended to take the following aspects into account:

- Sustainable tourism is a top priority, reflecting both the EU policy priorities, NTO priority and consumer demand. It is recommended that the EC works in conjunction with the ETC (and possibly) NTOs so as develop a strategy to include sustainable tourism, as a consistent feature in the actions funded under the grants
- Should funding of campaigns targeting European markets become a mainstay of grant funding, avoiding overlaps, and ensuring synergy – also with NTO action – will become considerably more important. A strategic approach to address potential issues, should, in this case be considered

7.6 EU added value

EU grant funding represents only a fraction of the funding which across Europe is spent on promotion of European destinations – but represents the bulk of public funding spent on promotion of "Destination Europe" and promotion of transborder destinations in long haul

[59] E.g. Promotion of EDEN destinations by the ETC; Integration, and use of the "Europe" logo developed under the COSME funded campaign "Europe, whenever you are ready" and coordination role of the ETC in relation to the implementation of the ECTY, where the ETC delivered a number of actions, with the aim to ensure synergy among different interventions.

markets. Co-funding opportunities provide an incentive to collaborate on campaigns and other marketing actions, and cover costs associated to their design and delivery. It is unlikely that NTOs would join forces for international marketing collaboration under a common identity if EU funds were not made available.

It cannot be evidenced that European campaigns, are more efficient or effective than national campaigns. As such, the added value is principally qualitative. This is directly associated with benefits of the marketing actions themselves; the structuring effect of the grants (especially as regards the ECTY) and indirectly, learning and sharing.

The added value of different lines of action is highly variable across NTOs and DMOs. Among others, marketing in long haul markets allows emerging destinations to test and develop new markets, at lower costs providing a presence and contacts (important especially for countries in Central and Eastern Europe). Collaborative marketing actions also allow smaller destinations to promote a transborder offering sufficiently large to be attractive for long haul visitors (e.g. the Nordic Countries). In contrast. the added value to NTOs with a "mature" offering in third countries (e.g. Portugal, the Netherland and Italy), is smaller explaining also low participation.

The more strategic impact on NTOs and DMOs marketing and branding actions is modest (across NTOs and DMOs).

Going forward it is recommended to take the following aspects into account:

- If EU added value is to be evidenced going forward, it will be key that the above recommendations related to objective setting, measurement, evaluation, and cost presentation are accounted for. This is the case not only for accountancy purposes but also for quantitative identification of actions which relatively generate more value for the EU Grants

7.7 Other issues

While assessing EU co-funded research activities is out of scope of the evaluation, it should be noted that a key spontaneous benefit of EU grant funding allocated to the ETC is that of research deliverables. Many interviewees highlight this particular aspect, and several – especially large NTOs – note that research outputs are the prime (or one of the prime) benefit(s) of EU funding. Hence it appears that this aspect of EU grant funding should be maintained and possibly strengthened going forward.