



Europeana – Core Service Platform

DELIVERABLE

D3.4: PLAN FOR EUROPEANA'S DISTRIBUTION IN THE TOURISM MARKET

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Executive Summary

The tourism distribution plan provides a starting point for the Europeana, analysing, reviewing and strategically recommending how Europeana can successfully distribute its content in the tourism industry. For the Europeana, this means taking strategic decisions to establish an annual programme of activities in tourism. This plan for Europeana's distribution in tourism needs to be approached with a long-term view.

One of the critical conclusions of this plan is the fact that the Europeana needs to establish Europeana as a brand in tourism, developing its communication, content, events and funding to be ready for exploiting its potential in tourism. It is important to understand that this will require significant investments and that there are no shortcuts to working with the tourism industry.

Currently, the Europeana is at a starting point and as a next step needs to make a decision about its commitment to tourism. This report is highlighting some opportunities and barriers for Europeana to venture into tourism. Upon the full commitment, it is then necessary to work on a business plan for Europeana in tourism, exploring a funding model for the work and activities in tourism. To begin with, this will require one Executive person to work out a concrete strategic direction, taking into consideration and assessing the return on investment depending on the business model and what partners and stakeholders of the Europeana would like to achieve.

The consultations carried out as part of this report mainly conclude that for Europeana to be used in any significant or widespread way, it needs to be contextualized and a bespoke approach needs to be employed to find the right fit for its re-use in tourism on a case by case basis. This involves making the data and service right for tourism end users which is a huge job, as Europeana is currently not developed for this purpose.

The consultations helped to reach this conclusion, along with the fact that the Europeana needs to make a decision whether it wants to become a significant player in tourism and to change from being an intermediary to becoming a content enricher, improving the usability and quality of content. In the context of re-use of content in tourism, Europeana is considered a platform rather than a portal, providing added value content to be used in tourism rather than being a portal, linking different systems as an interface.

Establishing the future role of Europeana is closely linked with defining the return on investment of Europeana's venture into tourism before developing further plans. The ROI of Europeana's venture into tourism is based on a qualitative approach, looking at the economic, socio-economic and overall impact on tourism as an industry. It is expected that investments into Europeana's re-use in tourism will have a multiplier effect on the overall tourism industry and a wide range of tourism organisations will benefit from a good content infrastructure and service in place.

The Europeana will also support the tourism industry in providing more cultural content, strengthening the cultural tourism offering and establish an overall deeper understanding of culture across Europe, developing different stories to tell in a tourism context. This will also support tourism businesses to develop better tourism products, enriched by culture and grow their business. Enriching content, making it easier to access and re-use in a tourism context will also enable the Europeana to be a driver in the standardisation of content. The wider tourism network is, therefore, expected to benefit from this content standardisation and overall availability of content for re-use in tourism.

Moving forward with this plan, if the approach is interesting, it is critical building on the industry consultation carried out as part of this work and develop a more concrete business plan for tourism outlining what is right for the Europeana.

Before diving into the plan describing Europeana's distribution in the tourism industry, it is important to explain how this document should be used and read. The plan focuses on four essential pillars: tourism industry mapping, industry consultation, key findings and recommendations and the implementation plan.

The industry mapping and consultation provide the reader with a solid understanding of how the tourism industry works, explaining the role and importance of different industry organisations and strategic recommendations stemming from the 17 individual consultations and focus group.

The strategic findings and recommendations outline a summary of long-term strategic actions, combined with more practical and hands-on tactical actions. This gives the reader a more concrete idea of the potential in tourism and concrete steps that Europeana needs to take to succeed in tourism. The implementation plan can then be used to illustrate an action by action recommendation, taking into consideration annual milestones and achievements per item.

To summarise some of key findings, the industry consultation and focus group highlighted that the data quality remains a barrier, requiring a significant amount of work to overcome this critical barrier. The process of curating Europeana content ready for tourism will take a considerable amount of time regarding the preparation of the data and building necessary industry relationships for its distribution.

The Europeana needs to build awareness around cultural tourism, its brand and the added value that Europeana can bring. This needs to be combined with extensive communication across the industry. By venturing into tourism, the Europeana needs to follow a very strategic and long-term approach to using available resources and lead to success.

There is a definite demand and indication across the industry, demonstrating that there are various opportunities for Europeana to succeed in this sector. Europeana's content need to be tourism marketer approved and its overall quality needs to match the industry's expectations. The Europeana and its work with cultural institutions across Europe can help increase the quality and relevance of tourism content through the strategic selection of tourism datasets to be used.

The Executive Team, responsible for Europeana's venture into tourism will also serve as a driving force to establish Europeana in tourism. A dedicated website, showcasing information on travel, along with a strategic communication approach and social media channels to be used can help to improve Europeana's visibility and awareness in tourism.

Further to that, the development of strategic partnerships will contribute to increase Europeana's standing in the industry. These partnerships with leading tourism umbrella organisations in Europe to begin with, will also enable Europeana to become a leading player in making more cultural content available for tourism organisations. Actively being part of a range of tourism initiatives and projects, will further highlight the high cultural tourism offering.

The distribution plan outlines in detail all strategic and tactical actions that can help Europeana to boost its potential in tourism. Over a suggested course of a four-year implementation plan, the Europeana will be able to succeed in the strategic distribution of Europeana content in tourism.

Chapter 1 Introduction

Europeana aims to make Europe's cultural heritage available online to everyone for work, learning and pleasure. The Europeana is on a mission to transform the world with culture. Starting in April 2015, the Europeana DSI (Digital Service Infrastructure) continued to connect the online collections of cultural heritage institutions. As part of the work package focusing on re-user services, SE1 Media has developed a concrete plan for Europeana's distribution in the tourism market, aiming to also explore the expected return on investment for Europeana.

It is important to mention that this tourism distribution plan is a starting point for the Europeana. There are critical strategic decisions that need to be made to establish an annual programme of activities in tourism. The distribution of Europeana content in tourism needs to be approached with a long-term view, understanding that this will require investments and that there are no shortcuts to working with the tourism industry. It is the aim of this tourism distribution plan to outline how Europeana can give direct value to the industry and establish its brand in tourism, detailing different steps that need to be taken for the Europeana to be able to succeed in tourism. In the context of this plan, success means the effective distribution of Europeana content in the tourism market and to establish mutually beneficial and effective partnerships with a select number of tourism industry organisations and industry bodies.

Europeana's distribution in the tourism market was approached holistically, focused on a clear methodological approach consisting of tourism industry mapping and consultation. Further to that, expert evaluation of the findings was used to be able to draw concrete tactical and strategic actions as part of the tourism distribution plan. The distribution plan itself was divided into eight chapters, each covering in detail individual components that led to its development.

The tourism distribution plan starts with establishing Europeana's potential in tourism, looking specifically at its current approaches and vision in the tourism industry. In the past, some policy recommendations specifically aimed at tourism were distributed by the Europeana. The chapter builds on these to further outline strategic tourism recommendations for the sake of creating demand for Europeana in tourism and identifying key interest groups. A complete picture of Europeana's potential in tourism was provided, including the analysis of best practice cases along with identifying concrete learnings for Europeana.

To consider the industry's needs and expectations, the tourism distribution plan also contains an extensive tourism industry map, providing a full overview of the tourism sector. Given the value of tourism in numbers, it is important to highlight changes and trends as well as explaining the way in which the tourism industry works. This information is particularly important for understanding how to develop distribution relationships with individual players within tourism. The full tourism industry is mapped out, starting with global policy makers and advocates, regional promotion and policy makers as well as national and city tourism promotion through to travel intermediaries, selling travel to customers.

A comprehensive selection of these different players in the tourism industry was consulted about the further potential for Europeana in tourism. Each consultation, its outcomes and findings are explained in detail as part of the industry consultation chapter. Concrete recommendations were outlined considering Europeana's approach towards engaging with policy makers, tourism promotion and marketers as well as leading travel and technology providers. This helps the Europeana to understand fully the tourism industry and its operations. The industry consultation formed an excellent base for Europeana to receive feedback and its findings provide a clear list of suggested priorities for Europeana.

Individual themes stemming from the industry consultations and expert evaluation are described further in the strategic findings and recommendations chapter. To ensure both tactical and

strategic recommendations are given, a long-term strategy and vision for Europeana in tourism was set. Further to that, a strategic action plan outlines a range of steps, activities and actions that the Europeana needs to implement win preparation for the distributing of its content in the tourism market.

Finally, the plan has a dedicated distribution roadmap, outlining what the Europeana needs to do in different areas of the industry. Each recommendation described in the tactical and strategic action plan has a timescale for its delivery. Further to that, many different milestones were included, in the prospect of helping the Europeana to understand the necessary steps and planning needed in view of launching the distribution of Europeana content and working actively with the industry to create a viable partnership and business opportunities in tourism.

It is important to mention that Europeana's plan for the distribution in tourism is considered a working document. As the tourism industry evolves and changes, the distribution plan will have to be adjusted. However, the tourism distribution plan is a good foundation for the Europeana to plan actions and investments accurately. Once further resources as part of Europeana DSI will be committed, the Europeana can work on putting the tactical and strategic action plan into practice.

Chapter 2 Methodology

Chapter 2.1 Research Approach

For the purpose of producing the tourism distribution plan, a range of research methods was chosen. The research process started by exploring the status quo of Europeana in the tourism field, analysing current projects and activities relating to tourism. Followed by extensive industry mapping, critical factors driving developments in the tourism industry were explained as well as illustrating key tourism institutions, their distribution channels and reach. To ensure the appropriate recommendations were drawn within the tourism distribution plan, individual consultations with the main tourism actors were carried out. This helped to dive deeper into Europeana's current positioning in tourism and to review the overall potential Europeana has in tourism.

Europeana's status quo

The team producing the tourism distribution plan have their core expertise in tourism, possessing a good understanding of the entire tourism industry and its key organisations, being in an ideal position to review Europeana's current activities. Material provided by the Europeana team as well as publications of previous ventures looking at cultural tourism were examined. Europeana Labs, Google's Field Trip app, Europeana Beacons are just some of the projects that were considered in view of its relevance for tourism and the tourism distribution plan itself. Further to that, industry case studies were analysed and reviewed to be able to draw the right conclusions and provide appropriate recommendations for Europeana in the short and long-term.

Industry consultation

The industry consultation was a fundamental part of the conceptualisation of the tourism distribution plan. 17 individual consultations were carried out, interviewing industry bodies in tourism, commercial partners and tourism destinations via phone, Skype or email. Each interviewee was carefully selected based on relevancy for Europeana, significance of the organisation within the tourism industry or the value of insights deriving from a consultation. Initially, 10-15 individual consultations were suggested by the SE1 Media team, however, to ensure the completeness of key findings and recommendations, a total of 17 consultations were carried out.

For each consultation, the adequate person for the consultation process was selected within an organisation and contacted. Background information about Europeana, the work on the tourism distribution plan as well as an outline of previous projects were sent to each interviewee. During each consultation, notes were taken, summarising the main points that were covered and discussed. Each consultation lasted up to an hour to ensure a sufficient amount of questions could be asked and relevant recommendations were drawn from the interviewee and any challenges or topics covered by the interviewee were discussed. Due to the difference in nature and business focus of each organisation interviewed, different questions were asked depending on current activities and overall remit in tourism.

After each consultation, the contents of the consultation were summarised and outlined in detail as part of the tourism distribution plan, mainly in Chapter 5 Industry Consultation. After the careful analysis of the consultation findings, the individual outcomes and recommendations are being outlined as part of the tourism distribution plan. Deriving from these recommendations, overall priorities and next steps for Europeana are summarised at the end of each consultation. Based on these recommendations, Chapter 6 outlines the long-term strategy and vision, along with the strategic and tactical action plan in Chapter 7, outlining the core components of the tourism distribution plan for Europeana in 2016 and beyond.

Chapter 2.2 Focus Group

The action plan and recommendations were based on the work carried out as part of the tourism distribution plan are not purely based on industry consultation. A focus group was organised to verify and test some of the ideas and concepts further. The focus group explored specific areas such as tourism visibility, communication channels and tourism datasets further. The focus group involved a mix of destinations, all focusing on culture tourism as a particular area of their tourist board. The focus group aimed to both verify ideas and concepts and include additional findings into the tactical and strategic action plan.

A variety of tourism destinations and providers were invited to the focus group to discuss Europeana's potential in tourism and concrete concepts that could both increase Europeana's visibility in tourism and create demand for actively working with Europeana as a content provider. During the focus group, a number of hypotheses were discussed, aiming to conclude into valuable findings that can help the Europeana to move forward in tourism. These outcomes are useful regarding highlighting some issues that can arise on a national level which needs to be understood and actions taken to overcome them.

Involving destination marketers as part of the focus group meant culture was already considered as a driver for tourism and more particularly to increase arrival numbers to the destination. Although the one to one consultations clarified some key findings, discussing some points in more detail meant being able to dive even deeper into the topic. For the Europeana, the outcomes of the focus group are further clarifying what they need to take into consideration when embarking into the tourism industry.

Analysis and expert opinion

All findings and outcomes from the individual consultations, focus group and initial research was carefully analysed as part of the extensive work carried out. The tourism distribution plan outlines key propositions for Europeana tapping into tourism as an active sector. Carefully considering Europeana's vision and overall strategy. It was also important for SE1 Media to ensure that the Europeana can deliver the strategic recommendations outlined.

The core of this tourism distribution plan is based on the expertise of SE1 Media's team of consultants, having a holistic view of the tourism industry and a profound understanding of the individual organisation within the industry. All findings and recommendations have undergone

testing and expert verification to ensure only viable opportunities for Europeana and its network were presented.

Based on the expert opinion of the SE1 Media team and careful industry consultation, the tourism distribution plan summarises and outlines key strategic decisions that the Europeana needs to make and suggests a framework for an annual programme that can be developed. It is necessary for this distribution plan to be implementable, so the recommendations have been kept as realistic as possible. As the tourism industry changes, this tourism distribution plan might have to be adapted taking into consideration these changes.

Chapter 3 Europeana: The Potential in Tourism

Chapter 3.1 Identifying the potential in tourism

In December 2014, the Europeana released a set of [policy recommendations](#) to increase the use of Europeana content in tourism, following the Italian EU presidency. A change in thinking and overall behaviour was suggested to achieve a more systematic approach towards content in tourism.

Jill Cousins, Europeana Executive Director, stressed the need to "create demand for Europeana in the tourism sector and ensure that cultural organisations can feed in with high-quality content. We need to shout about our benefits and best practices and build solid and productive relationships between cultural institutions and the tourism industry."

For 2015, the Europeana set out to follow a clear vision as part of their policy recommendations which was to "increase the use of Europeana-enabled cultural heritage content through its systematic implementation in niche and participative tourism". The policy recommendations outlined four key actions to be used as a foundation to explore Europeana's potential in tourism further and recommend a plan of concrete measures, working towards fulfilling Europeana's vision.

The key actions featured as part of the policy recommendation are the following:

1. To create demand within the tourism sector for the Europeana-enabled content of the cultural heritage organisations
2. To promote a high-quality supply of Europeana-enabled content from the cultural heritage organisations for re-use
3. To better articulate the value of linking supply with demand through case studies and best practice examples
4. To establish and build on the relationship between cultural institutions and tourism bodies

These actions were based on outlining specific recommendations for tourism policy-makers and cultural policy makers:

- Using case studies and user statistics, tourism policy-makers should advocate and promote the value of using digitised cultural heritage content in cultural tourism marketing strategies
- Using case studies and visibility statistics, cultural policy-makers should demonstrate to cultural institutions that their digitised cultural heritage content is a valuable asset in the advocacy and promotion of cultural tourism marketing strategies
- Tourism and cultural policy-makers should actively cross-promote the funding programmes and activities for the development of cultural heritage tourism that are available both nationally and from Europe

- Tourism and cultural policy-makers should encourage the development of mobile applications at local, regional, national and European level
- Policy-makers should highlight the value of cultural heritage content as an asset in the promotion of niche destination marketing, addressing tourism sector challenges of seasonality and locality
- Policy-makers should promote closer collaboration between local tourism bodies, service providers and cultural institutions
- Tourism policy-makers should view Europeana as a resource they can build on and shape according to the needs of the tourism sector locally, nationally and across Europe and state their needs of that resource
- Cultural policy-makers are encouraged to take active and coordinated measures to promote the digitisation of Europe's cultural heritage, including 20th and 21st-century material. They should articulate how the widest possible access to, re-use of and preservation of digital cultural heritage benefits society and the European economy, and the ways in which it can address the needs of the tourism sector.

Identifying the real potential in tourism means differentiating between opportunities such as augmented reality, virtual reality, NFC technology, mobile apps and other digital tools that are part of the tourism experience and Europeana's strategy in tourism. Tourism projects that Europeana has supported in the past have focused on the tourism experience rather than driving visitors to places, benefiting its destinations and attractions.

The Europeana, therefore, needs to change its approach and become more strategically focused, taking advantage of the opportunities of culture in tourism and stimulating demand for the tourism industry. Europeana's potential in tourism is not going to be built on projects involving latest digital tools and technologies, integrating Europeana content in a smart way.

How can Europeana stimulate demand in tourism? Europeana has pioneered projects aimed at the tourism industry such as Google's Field Trip app and Europeana Beacons featured on the Europeana Labs. These projects were considered as interesting by the tourism trade but quite small and focused only on specific cases. In comparison to that, tourism destinations and businesses are working on and delivering much bigger campaigns and initiatives each year. It is, therefore, recommended to target tourism players as the main target group, changing the approach.

The majority of industry professionals are therefore unaware of these projects or Europeana's involvement in them. As far as the tourism industry is concerned, Europeana is currently at a starting point, needing to do significantly more to establish itself in tourism.

Although this might be viewed as a negative, the groundwork being carried out over the last years in travel has meant that a much more strategic approach can be taken. The success Europeana has had so far and the brand being clearly established in the cultural sector can be used as a foundation.

The following projects were looked at in detail and analysed:

Google's Field Trip App

Google's Field Trip app utilises curated Europeana content that is related to archaeological sites, historical buildings and monuments. Europeana involved four pilot countries which are Sweden, Estonia, Poland and Austria. Depending on a user's location, the app notifies the user about interesting things nearby. Consumers can discover their surroundings in an entirely new and enriched way.

The app being initially released in 2013 and has since been updated, improving functionalities and overall usability. There are many appealing features on the app such as the availability of content on the go, push notifications and the possibility to choose their frequency.

The Europeana content is available in the app since March 2015 and was provided by the national heritage boards of Sweden, Estonia and Poland and the national library of Austria. Due to the fact that the content is shown based on a user's location and preferences, the earned visibility within the app is limited. However, the content is visible enough if it fits user's interests and the user is in one of the four countries. There is a definite value in collaborating with major players in the industry such as Google.

However, there needs to be a clear value for Europeana before investing further resources into the development of content ready for the inclusion into the app. When providing additional information, it is important to provide content that is unique, provides a personalised user experience and continues to tell a story. In general, the scope and amount of Europeana content featured in the Google's Field Trip app need to increase to become a viable project comparing investments and output. Considering the time and resources needed to make Europeana content suitable for tourism, it is too early to be involved in these kind of apps.

Europeana Beacons

The use of ibeacon technology was one of the core technologies explored further by the tourism industry in 2015. The Europeana Beacon app, developed for iOS in 2014, is a new way of exploring a city. It puts a real-time, proximity driven system right into the hands of users, leveraging the potential of Beacon technology with Europeana's extensive database. The Europeana Beacon app is combining a comprehensive guide with a scavenger hunt. Tourists can listen to a comprehensive guide, informing them about different places and landmarks to discover. The scavenger hunt is engaging different users in a hunt looking for a range of clues. This educational and gamified experience is in line with current consumer trends and an experience driven way of exploring a destination context.

The project is a great example, showcasing the importance of working directly with the development community on ensuring developers understand how they can re-use the Europeana content. This app being the winner of the Hack4Pisa Hackathon demonstrates the importance of organising events to engage the creative industries.

This is a common issue with the development of apps, as a certain level of traction needs to be established first, before consumers or companies see a value in investing. Often it is recommended to develop apps on the basis of tapping into existing and established technologies or teaming up with other organisations where a collaboration seems mutually beneficial and can help to deliver a project at scale.

After the hackathon and Europeana's venture into engaging with the creative industries, there will be learnings that can be taken away for future projects and working with the creative industries. These pilot projects are an essential part of testing different approaches to be able to implement the learnings in the planning of future activities for the creative sector.

VanGoYourself.com

The idea of VanGoYourself is simple, creating a fun experience, re-creating historical artworks and sharing them online or just keeping the creations. A selection of paintings were used in the development process, tapping into Europeana resources. Being an interactive and fun project, it is aimed at a wider audience, from museum visitors to art enthusiasts, being able to re-create a painting's surroundings, characters or items that are part of it. Pictures taken recreating a variety of paintings can be uploaded to the web service platform and shared with the community.

The campaign was launched on the crowdsourcing platform Goteo, raising sufficient fund for its implementation and showing the demand for new and innovative products for the community. VanGoYourself actively raises awareness about paintings and encourages consumers to explore their favourite paintings further.

However, the potential for this in tourism is limited, due to its nature of being a niche product and more focused on fine arts, rather than benefiting a persistent in destination or tourism experience. There are opportunities to work with tourist boards to promote their destinations or using a common hashtag to gain traction about this movement on social media. A strategic approach is required to start any further campaigns or initiatives supported by players in the tourism industry.

The above projects are just merely a selection of Europeana's experience so far in tourism. The Europeana had also approached bigger organisations such as Booking.com and TripAdvisor to use Europeana content as part of their guides and information offering directly to consumers. However, so far the Europeana faced limited interest due to a number of reasons, making it difficult to work out a collaboration that is mutually interesting for both organisations.

The Culture24 report Moving Targets 'Engaging cultural tourists with collections and listings content online' is identifying and evaluating the various user needs that impact on the provision of certain cultural digital content to cultural tourists. In-depth research highlighted the fact that there is some awareness currently of digitised collections content among tourists, however, there is little usage and engagement with it. Further to that, the research also pointed out that organisations such as TripAdvisor, Rough Guides and Lonely Planet do not provide any cultural event listings and tourist boards often do not have a cultural tourism strategy in place.

The following recommendations were highlighted as part of the report:

- Recognise that designing services for cultural tourists is challenging as they represent a 'moving target' whose identity, motivations and behaviours can vary considerably
- Adopt a demand led approach that keeps asking the question: why would a potential cultural tourist be interested in using the service being provided?
- Identify clear niches of use and tailor services to meet these, rather than attempting a 'one size fits all' approach for the mass tourist market
- Only supply content/information of a high standard that is engaging, 'sticky', rich, shareable (technically and legally) and up to date
- In a rapidly changing digital information landscape, keep continually abreast of changing demand and supply driven needs and design adaptable services that are better equipped to meet these changing needs
- Think big but act small – focus on smaller, more manageable and easier to get off the ground solutions and services
- Keep evaluating success or failure by measuring impact of services and user engagement rather than just outputs and outcomes

The above recommendations are still sound advice, four years after the report was initially written and it is the aim of this report to highlight further recommendations for the Europeana based on an extensive industry consultation.

Chapter 3.2 Strategic tourism recommendations

The Europeana needs to establish itself as a thought leader for culture and tourism, being able to drive thought leadership in the promotion of cultural tourism. This might go as far as establishing an official Think Tank for the cultural sector. There is a clear need for an organisation to step up and officially gather best practices, case studies and trends in cultural tourism on an ongoing basis, sharing insights and information with the wider industry.

A few years back, the Digital Tourism Think Tank was created as an initiative providing thought leadership in digital marketing aimed at tourist boards. There was a clear need and opportunity

for an organisation to establish itself as the go-to place for all things digital, showcasing the best examples from within the industry and actively supporting tourist boards in their move towards digital. With limited resources, the Digital Tourism Think Tank managed to become the brand and organisation known to be at the cutting edge of all things related to digital marketing and tourism. Starting with showcasing video and written up cases studies, focused on the digital marketing work of destinations, the Think Tank quickly increased its following.

The key driver in raising awareness among tourist boards was the fact that the case studies were highly visual and the video interviews were easily digestible and appealing for destination marketers. In 2012, the majority of content was still in basic format, most reports and written pieces were still completely factual rather than focused on takeaways specifically for marketers. The Think Tank spotted this gap in the industry very early and successfully provided a platform for the destination community to share openly their experiences, thoughts, challenges and results of campaigns, strategies and overall activities.

Somebody needs to combine culture and content, providing best practices to the industry, including case studies, reports about key issues and drivers in these industries. Emphasising how different organisations are actively linking supply with demand in tourism can illustrate what it means to be successful for other organisations wanting to utilise content to create viable products in tourism. By becoming the go-to platform for culture in tourism, a community can be developed and a leading role in the industry will be maintained.

The Europeana has high potential to own its role as a thought leader for cultural tourism, as the organisation is well respected in the cultural sector and has a great database and product to use. However, Europeana's potential in tourism is reliant on raising awareness about culture in tourism, lobbying on behalf of tourism and cultural policy makers, strengthening their efforts in communicating the value of cultural tourism. Building a network of professionals in the industry, passionate about culture in tourism will help to integrate Europeana further into any activities, strengthening cross-sector relationships between tourism and culture.

It is important to understand that establishing itself as a thought leader for cultural tourism is a necessary step. For the Europeana, this means concretely that a dedicated platform for tourism needs introducing. Currently, Europeana focuses its efforts on bringing key players in the industry and stakeholders together, mainly through the EU presidency meeting as well as other year-round events. However, to be able to demonstrate the value of culture in tourism as a niche sector, it is necessary to become the go-to point for any information relating to cultural tourism projects.

There is no organisation currently establishing itself as the leading platform for culture in tourism online. Through searching the web, information about culture in tourism depends heavily on the European Commission and other public authorities publishing reports and memorandum of understandings about their view on the importance of the cultural sector for tourism. It is a significant opportunity for Europeana to establish itself as a thought leader, platform and an active driver to support the potential of culture in tourism.

Chapter 3.3 Creating demand for Europeana in tourism

Referring to the policy recommendations outlined at the start of this chapter, Europeana aims to work actively on creating demand for Europeana in tourism. The Europeana further drafts in its Business Plan 2015 that it will introduce new thematic collections to engage new audiences, particularly in the areas of Art & History, Music and Fashion, in addition to the already existing and unique 1914-1918 thematic collection. These collections were aimed at the end-user, supported by the use of a blog, newsletter, exhibitions and other marketing mechanisms to reach the end user with the promotion of its end user products. Audience development, content

selection and the running of marketing campaigns are core responsibilities of Europeana's end-user efforts.

Tourism and education are the only areas of focus within Europeana without a dedicated website. Further to that, the strategic positioning in communicating the topic of re-use in tourism as a core market is not developed yet. There are clear quick wins when actively creating demand for Europeana in tourism.

Firstly, Europeana should create a dedicated website, where information about the re-use in tourism could be gathered. This can then be established as a go to point for potential interest groups and stakeholders.

Secondly, a blog gathering best practices, case studies and trends focusing on the cultural tourism sector will provide a much-needed center for useful information for the tourism industry. This can help to raise awareness about Europeana as a brand and the value of culture in tourism. Thirdly, a dedicated newsletter, updating the tourism industry on a monthly basis about the work carried out, events, case studies and opportunities will help to establish a more regular direct contact with the industry. Also, LinkedIn groups, dedicated to bringing together specific interest groups, in this case, tourism professionals and policy makers, can also help Europeana. Through the introduction of the group, demand for Europeana content can be created, strengthening its visibility and also starting conversations as part of the group.

Destinations and marketers will naturally look at the potential of culture and tourism, as they can develop new products, helping them to increase awareness of their destination or businesses as well as increase visitor numbers. When developing a tourism product based on cultural aspects, it is important to research which cultural elements exist in the destination or on the market and which target groups resonate the most with topics. It is also important to identify the potential of certain cultural tourism products in comparison to other existing products on the market. As many cultural aspects will be similar to some destinations, there are clear opportunities to collaborate among destinations and strengthen the offering.

By focusing on the learnings and experiences from others in the industry, case studies and best practices, might help to identify where there is a consumer demand and actively partner with other reliable partners in the sector.

In the long-term, Europeana should become a leading partner in both raising awareness about both the potential and best practices in culture and tourism. Further to that, they should actively support destinations in the development of tourism products and contribute with Europeana's experience in working on incubators and accelerators as part of their activities in other sectors. The strategic positioning of the Europeana will naturally create demand for Europeana and the re-use of its content in tourism.

Chapter 3.4 Key Interest groups for Europeana

In tourism, there are three key interest groups that Europeana should take into consideration when thinking about the potential for tourism. Due to the nature of the tourism industry, there are multiple levels of interest groups that Europeana needs to engage. These are at the ministry and policy level, the marketer level as well as the organisational and tourism body level. Each of these interest groups needs to be targeted individually to work collaboratively and establishing activities moving forward. For each key interest group in tourism, a different approach should be taken, understanding the needs and expectations of each cluster, approaching a collaboration based on the organisation's needs.

Europeana should focus its activities in tourism on the following key interest groups:

- Tourism policy makers and ministries

- Tourism professionals and marketers
- Tourism organisations and associations

Tourism policy makers and ministries are necessary to consult and engage with due to their influence on policy making in tourism as well as opportunities to lobby for culture within governmental bodies in Europe. It is crucial to establish good relationships with the different tourism ministries in each country, actively supporting culture, understanding the value of Europeana and communicating this internally to the ministry's stakeholders. It needs to go further than working on policy recommendations but focus on establishing where there are activities, events as well as other opportunities for Europeana to work closely with the different tourism ministries. A concrete output should be defined and agreed before venturing into relationships with ministries and local collaborations to ensure that it serves a purpose and will contribute to active re-use of Europeana content.

Tourism professionals and marketers are another key interest group, due to a more direct work on campaigns carried out year round for their tourism businesses and destinations. For any tourism professional or marketer, culture is an essential driver for tourism, often being the focus of product development, working closely with the domestic cultural sector. However, for Europeana, it is important to understand the current landscape of tourism businesses and destinations and how they are actively using cultural content for tourism. There will be a range of topics and areas where Europeana already has a wealth of content.

Tourism professionals need a platform that informs them about Europeana and the opportunities to re-use content for tourism purposes. Any communication needs to be tailored and explain how content could be used and what Europeana has to offer for them. Clear content re-use opportunities should be narrowed down for them, making sure the wealth of content is not too overwhelming and stopping them from using Europeana as a resource.

Tourism organisations and associations are the third interest group. In comparison to policy makers, ministries and tourism professionals, this interest group needs to be approached differently. The Europeana needs to be clear about how each of these organisations works and what value a relationship and cooperation with the organisation or association bring. Often the members of these organisations are more interesting as target groups, as the organisation can reach all of its members, highlighting unique potential for collaboration. As many tourism organisations are approached by many organisations, it is important to understand how Europeana can be of value for the organisation's members and what opportunity this brings for the organisation to actively support a relationship among its members.

To ensure each interest group is reached, it is important to follow a strategic approach when targeting, engaging and working with them. Undoubtedly, each interest group will need a different approach due to the nature of work they do, their needs and expectations towards collaboration. For Europeana, this means embracing a strategic mindset focused on business development. Collaborating in a mutually beneficial way that benefits all parties involved is crucial, ensuring that goals for each partnership are set in advance and met.

The Europeana needs to focus on the above three interest groups to begin with, gradually extending its relationships and collaboration to create value for partners and the society. Although Europeana clearly is at a starting point with regards to tourism as a sector, the industry consultation highlighted that there is a clear potential. Working together with these interest groups means establishing Europeana as an organisation and furthering its re-use in tourism.

Chapter 3.5 Current Best Practices and Learnings for Europeana

When discussing Europeana's potential in tourism, it is important to look at current best practices and learnings from existing initiatives, projects or campaigns and apply these to Europeana if relevant. With tourism being such an integral part of society, there are many opportunities to promote tourism destinations through a thematic focus. Each year, there are many opportunities for Europeana to collaborate with the main players in the industry and be part of a bigger project. It is important to see which projects are considered a success, why and see how in the future, Europeana can be part of these.

In the following, some projects are introduced, showing what has been done in tourism and outlining some of the key success factors and highlighting what Europeana can learn from these. Because of Europeana's past projects in tourism focusing more on the experience rather than driving visitors to a place or attraction, there are some takeaways to consider when considering Europeana's potential in tourism.

Europeana content to add value:

Europeana has the distinct advantage that it has worked with cultural institutions across Europe, gathering content which can easily be pulled into a project or campaign. This means that Europeana as a cultural content partner can add real value, drawing in its content from the database, enriching existing projects with a cultural layer. It is important for Europeana to understand that its content is genuinely relevant for most campaigns and at the same time continue to improve its database and work with cultural institutions to increase the access and re-use of more content across Europe.

Best practice campaigns:

Undoubtedly, a lot can be learned from looking at best practice digital marketing campaigns. Especially with regards to how a campaign in today's digital age is designed, particularly in relation to its communication, design, content and inclusiveness, making sure a wide range of people can be interested in the campaign and mainly attracted to travel to specific places.

Bringing partners together:

What brings individual partners together to work on a project is the opportunity to work together and meet each other's commercial objectives. With budgets becoming smaller, the Europeana needs to establish clear commercial needs and objectives of individual organisations. By identifying what each partner's leverage is, Europeana can actively create opportunities and drive demand.

Thinking commercial:

Successful campaigns and projects are based on commercial thinking from the start of a project to its delivery and outcomes. With funding always being an issue, it is necessary for each project to ensure that funds invested have a clear return on investment. Project goals and targets need to be defined beforehand. Often when collaborating with big players in the industry, it is easy to secure additional funding specifically focusing on them supporting the campaign with advertising, targeting and re-targeting specific consumer to increase engagement.

Europeana has a distinct advantage when thinking about partnering up for the delivery of projects:

Content and content support:

Europeana can provide excellent content to use as part of campaigns and projects. Also, for each project, Europeana can also provide content support, being able to deliver a wider range or the unique content to be used.

Links with significant exhibitions:

Establishing partnerships and providing links with exhibitions is also relevant and useful especially for transport providers, DMOs and operators, enabling them to sell their tourism and cultural products and services.

Facilitator:

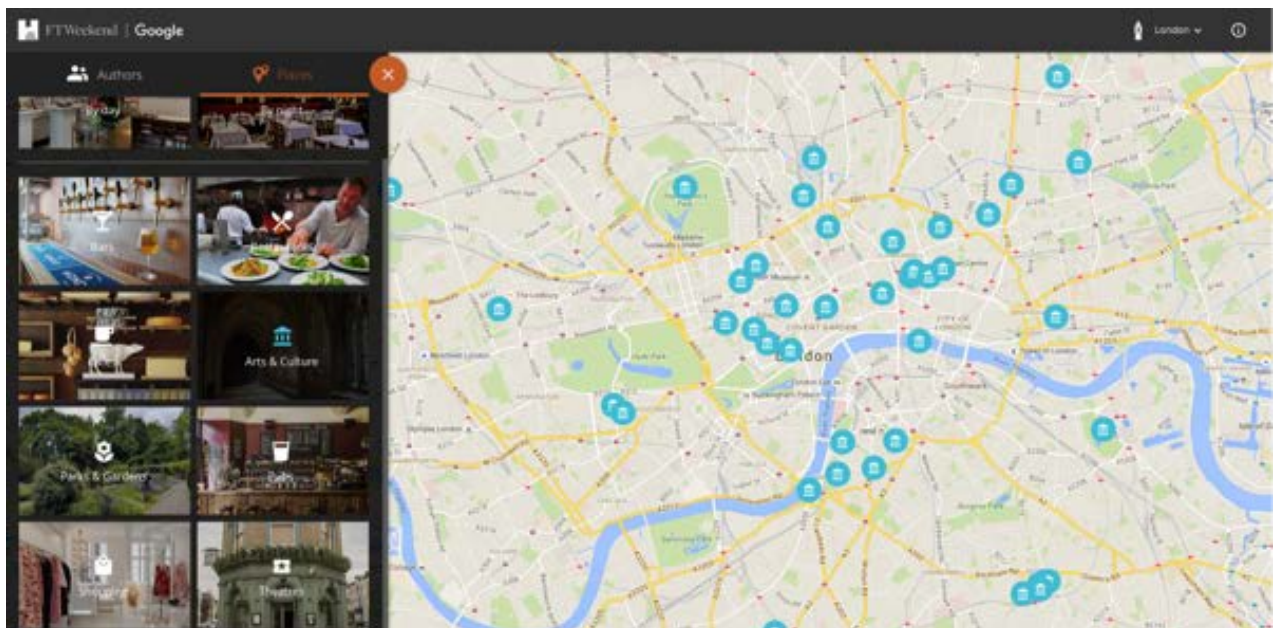
The Europeana can also bring different partners and organisations together by adopting the role of a facilitator.

Financial Times - Hidden Cities

The Financial Times Weekend Hidden Cities with Google project takes advantage of the Financial Times' network of journalists, showcasing places to go, experience and explore. As the project title indicates, the aim is to go beyond offering information about popular choices in cities, but share expert tips and opinions on which places are worth going to identify some hidden treasures for visitors and locals alike. Besides FT's city experts, the series has been supported by Google technology, using the power of Google Maps to bring the locations included to life. So far, the dedicated 'Hidden Cities' [website](#) is featuring London and Brussels.

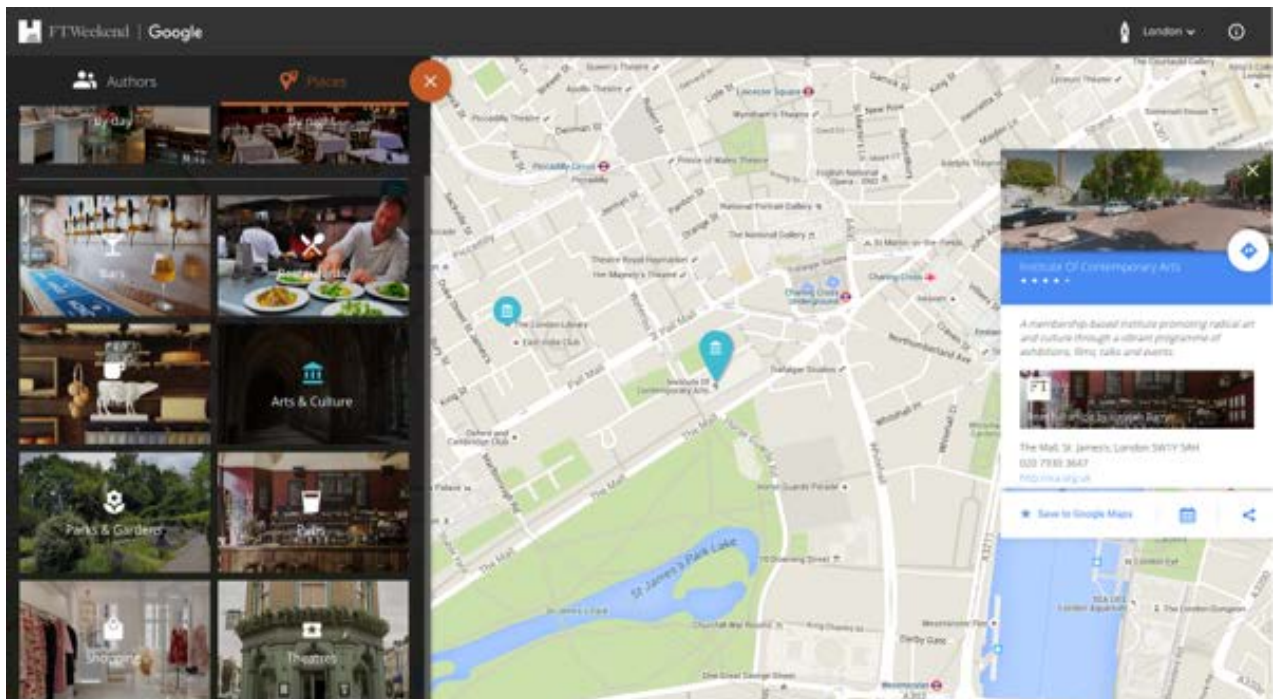
The user can choose in the website to read about particular places that different authors have recommended or instead browse the site by exploring places. These places are divided into the following categories:

- By Day
- By Night
- Bars
- Restaurants, Cafes
- Arts & Culture
- Parks & Garden
- Pubs
- Shopping
- Theatres



The website is developed in a very fresh way, focusing entirely on Author recommendations and tips, Places and a seamless integration of Google maps to showcase specific places within the city. This campaign is a nice example of how a campaign should look like both in terms of featured content as well as making a city look 'sexy', highlighting hidden treasures that are worth a visit. The Hidden Cities campaign is particularly interesting due to the intersection of quality content and technology, with the Google Map's centric presentation making the editorial recommendations more useful. With an established reader base of the Financial Times of 747,000 in paid print and digital, the ongoing resource, available on mobile and desktop is a new and dynamic way to tell stories and create rich experiences for their audience.

For Europeana, this campaign illustrates a great opportunity to cooperate and partner up with other big players, pulling in Europeana content and showcasing it in a new and appealing way. This clearly shows the kind of campaign Europeana should be actively part of and the type of partnership and collaboration that would give Europeana sufficient exposure in tourism. It is also important to stress that this project is still a commercial one, creating value through an excellent and compelling delivery of content and at the same time making sense from a business point of view - both are absolutely crucial to ensure its success.



Hidden Cities provides an interactive, mobile and desktop experience, providing access to enriched map locations and recommendations in the form of digestible blog style articles. This helps the large readership of the Financial Times to discover fresh perspectives on some of Europe's cultural and political capitals. In October, the Financial Times Weekend Magazine also published a print supplement of Hidden Cities, providing their readers with a new way of telling stories, creating rich experiences for their audience. The campaign illustrates how technology and journalism can work together, through a strategic partnership to help people discover Europe's hidden gems.

Eurostar - New route campaigns

The cross-channel train operator Eurostar is continuing to expand its routes across Europe, focusing on promoting these to their current users. With the travel provider landscape continuing to become more competitive, new providers such as Deutsche Bahn will enter the cross-channel

market, competing for the same routes. For Eurostar, it is, therefore, necessary to focus its marketing efforts on highlighting the rich experiences visitors can have in different European cities they have routes. Focusing on building an emotional connection, Eurostar is aiming to deepen its engagement with travellers, featuring immersive video content throughout their social media channels.

In 2014, Eurostar introduced its video series 'Stories are waiting', pushing crowd-sourced videos across social media, featuring a range of topics, aiming to engage its consumers on a deeper level and repositioning Eurostar as more than just a transport provider, especially with the market continuing to become more competitive. In May 2015, Eurostar added a new direct service to Marseille in the South of France, and released promotional videos on the web focusing on '12 hours in Marseille'.

Immersive city promotion

'12 hours in Marseille' is a short promotional video that helps consumers to discover the capital of Provence through the eyes of a local. The video is shot from a first-person perspective, showing what a visitor to the city can experience during the 12 hours. Eurostar invested heavily in the promotion of 'South of France Holidays', with direct routes from London and Ashford in the UK. Some video campaigns were launched on social media, targeting specific consumers, going into depth in showcasing what the South of France has to offer. Dedicated pages, on Eurostar's [website](#), are promoting Marseille, Lyon and Avignon, featuring a range of content. Currently, Eurostar is working with Lyon as a tourist board and also producing their own video content to be featured on the website. This helps to enrich the customer experience online as well as provides some original content of the city. 'A walk through East London' is a similar video, showcasing a new perspective of London focusing more on featuring hidden secrets and new discoveries in London.

For Europeana, it is interesting to support transport providers and destinations with its content which could add value to a partnership. This means, however, that all content re-used as part of the campaign needs to be interesting, engaging, unique and ready for full commercial use. Following a commercial approach, however, also means that there needs to be a definite increase in bookings as an outcome of the campaign. Europeana needs to be able to contribute by delivering high-quality and exclusive content.

Chapter 4 Tourism industry map

Chapter 4.1 Overview of the tourism industry

Chapter 4.1.1 Tourism in numbers

'Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.'

Tourism has been one of the fastest growing economic sectors in the world over the last few decades, and one that has also experienced deepening diversification. Tourism is crucially important for the development of nations as it now comprises a large number of new destinations. This diversity ensures that tourism is a key driver for socio-economic progress in the world.



Today, the business volume of tourism equals or even surpasses that of oil exports, food produce or automobiles. Tourism has become one of the major players in international commerce, and represents at the same time one of the main income sources for many developing countries. This growth goes hand-in-hand with an increasing diversification and competition among destinations. This global spread of tourism in industrialised and developed states has also resulted in economic and employment benefits in many related sectors - from construction to agriculture or telecommunications.²

UNWTO Tourism Highlights, 2015 edition

The number of international tourist arrivals grew by 4% in the first half of 2015 according to the latest UNWTO World Tourism Barometer. Destinations worldwide received some 538 million international visitors between January and June 2015; an increase of 21 million compared to the same period in 2014.

The tourism industry is also an industrial sector that makes a substantial contribution to European economies. Europe, the most visited region in the world, led growth in the industry as a whole in 2014, and increased international arrivals by 5%, benefiting from a weaker currency in the Eurozone. In 2014, including its direct, indirect, and induced impacts, the tourism industry supported 33.5 million jobs and made a contribution of approximately €1.6 trillion to gross

domestic product (GDP), or 9.3% of total European GDP. By 2025, the travel and tourism sector's total economic contribution is expected to expand to 38 million jobs and €2.1 trillion in contributions to GDP (9.9% of total European GDP). [WTTC report]

Chapter 4.1.2 Tourism trends

Growth in the tourism industry and the rapid development of technology changed the travel industry. There are certain trends that prevail currently and they must be analysed thoroughly before further assessing the tourism industry as a whole. The increasing number of travellers creates demand for different services and approaching customer-related change accordingly; the world of infinite information and the abundance of choices has its own framework.

The most important evolutions in tourism resulted from technological change and the development of the information society. Technological development and the use of new devices such as smartphones or wearables have changed the behaviour of travellers. Today, everybody with a smart device, whether tablet, phone or wearable technology is able to be more active in any stage of a tourism journey. Access to a wide range of products and a nearly infinite number of tools, which can be used for search and comparison before making a final choice, makes a big difference to the average experience of tourists.

More and more people are using mobile devices for everyday activity, and the fact that more than 20% of Americans own a wearable device will have a big impact on travel behaviour. Travellers can be inspired, plan, book and share experiences, and do it all on the go. This helps shape the industry, and makes it possible for travel related companies to more accurately target potential customers. Additionally, holding the interest of customers can be achieved in many more ways, and more extensively, than pushing advertising only until the customer makes a booking.

Chapter 4.1.3 Consumer Journey

The average traveller checks at least 3.6 websites before booking, and the average amount of time that website information has to catch the client's attention is limited to a few seconds. This impacts on the ways in which the travel industry targets its audience and changes the classical approach to the consumer journey. Historically, the phases 'dream-plan-book-travel-share' were prominent, and the journey was ultimately linear; targeting people through well-established channels.



Currently, and as a consequence of technological developments, the same process is more like a cycle, and every stage features many approaches with regard to how to target the consumer. It makes marketers' lives complicated, as it is no longer so easy to interrupt people, as they have considerably more control over the information that they wish to see.

It is crucial to identify and choose the most efficient communication channels for every stage of the visitor cycle. For the 'inspirational phase', the focus should be on pushing people toward interest rather than generic, content-driven campaigns, while visitors' identification with the message and story is very important to ensure that they are led from the inspiration stage. Finally, booking must be transparent and intuitive. The customer experience will be more efficient and effective if the traveller is engaged in a conversation, and this will also more likely lead to increased sharing capacity, which will trigger and influence other travellers.



Today, it is possible to share experiences at every stage of the consumer cycle, while enabling customers to book on the go. Such trends are prevailing owing to the fact that the use of mobile platforms among younger travellers is so high. Indeed, research indicates that 43% of young people utilise their phones every five minutes. While this provides opportunities, it also makes targeting them more complicated. Mobile devices are of comparable capabilities to PCs, yet they are regarded as smaller versions of the desktop experience, with relatively limited functionality, content, and navigation points. This thus requires special adjustments from the industry, with the ability to target these users through their favourite devices successfully is increasingly important.

Travellers are increasingly flexible and targeting them gets complicated; marketers have to find appropriate timeframes and target them accurately. The ability to use a variety of the devices also makes it difficult for marketers to evaluate data and target audiences. The majority of consumers move between devices in order to accomplish a goal, using an average of three different screen combinations each day. The consumer can easily look for inspiration and drop out a few times before making a booking on a different device, which makes assessing the reasons for dropping out problematical, and equally it is difficult to identify whether the booking was made by the same person, or to identify the reasons for such behaviour.

Social media also has a big impact, creating platforms for travellers to share experiences, with companies only left with the problem of figuring out how to use that to their advantage. Constantly growing influence through user-generated content of users enables the industry to listen more than talk, and the era of one-way media engagement is long over. Brands in travel, as

everywhere else, are engaging in the conversations. For instance, airlines previously focused only on the shopping and booking stages of the consumer journey, now have to interact with the customer through multiple different legs, and in many cases airlines have actually started managing the complaints of customers via social media sites such as Twitter, enabling them to respond more efficiently.

Review sites have also impacted the industry in their own unique way. Having the ability to utilise the best of the widely known word-of-mouth marketing techniques and the desire of consumers to book where they choose has made a big difference in travel. The ability to browse and compare many different options before making a decision has also impacted travellers; they are better informed and feel more comfortable, as they have an impact on businesses by reviewing and rating experiences.

Chapter 4.1.4 Sharing economy

Increased numbers and income from travel globally also shape the industry in their own way - people have more holidays, but they are shorter, so they look for unique experiences and personalised trips. There are more and more travellers who seek local experiences, enabling them to avoid being just a spectator. This has created a niche for services which is often referred to as the 'sharing economy' in travel, where companies like AirBnB and Coach Surfing have revolutionised accommodation, while Uber has changed the transport sector. One of the key factor that contributed to this success is the ability to offer the same product lower prices, while also responding to the desire for unique local experiences that traditional businesses are not offering.

'The sharing economy has burst onto the scene of the global travel industry. At the last meeting, two years ago it wasn't even a topic. <...> The likes of AirBNB and Uber have been under scrutiny in various places around the world with opposition from local governments, hoteliers and taxi drivers who often consider the services unfair competition, or believe they are evading taxes and regulations that apply to legacy providers.' *Speaking at the 21st General Assembly in Medellin, Colombia, Taleb Rifai, Secretary General of UNWTO*

Despite the pressure from other industry players, this is likely to evolve and become even more prominent, owing to demand from travellers. One of the reasons for this is the desire of travellers to interact with locals and enrich experience. In particular, examining trends prevailing among millennials is always enlightening, as they are the future travellers and the segment that accepts change most readily.

Current research of this youthful segment of society suggests that 23% are keen to hang out with as many different nationalities as possible while travelling, compared to 8% who prefer to seek out other travellers from their own country. Important features such as tasty food and friendly locals underline the millennial traveller's desire for local experiences, and this is going to be an important trend for the future.

It is not yet certain whether this will transform the entire sector, or change the way hospitality is provided entirely, as it is possible that a large fraction of people will still choose conventional establishments for accommodation, along with established forms of transport. On the other hand, this provides incentive for conventional accommodation providers to offer diverse experiences as well as competitive prices.

Chapter 4.1.5 Future of cultural tourism

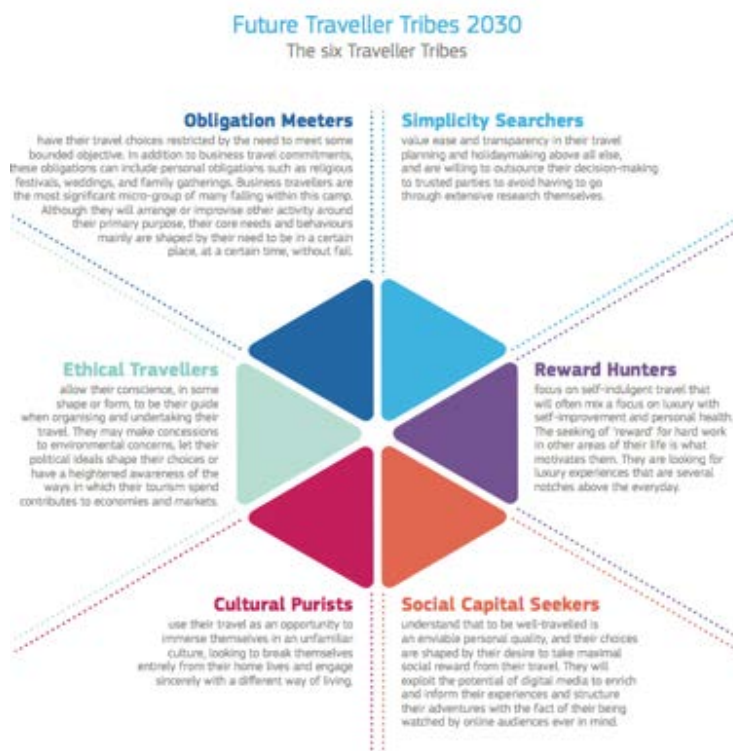
The changing landscape creates a perfect opportunity for new businesses to emerge, as well-travelled consumers are more likely to opt for niche travel products. This will remain important in

the future, among top travel motivators such as to experience everyday life in another country and increase knowledge, while relaxing and being calm are at the bottom of the travel to-do list-

Cultural tourism is related to the transmission of knowledge and ideas of a destination area or host community. As tourists become increasingly curious about different kinds of experiences and cultures in various parts of the world, they have a tendency to travel in order to learn and experience the culture of a particular tourist destination. This becomes the prime motivational force for their travel. This kind of tourist likes to visit different types of cultural epithets, ranging from concrete attractions such as museums and monuments, through cultural performances and other such manifestations, to the consumption of the way of life of certain cultures.

'Young travellers are enthusiastic about old city centres and historical and cultural diversity: 76% of visitors take time to explore historical monuments vs. only 56% in non-European cities; they find it easy to explore thanks to accessible public transportation in cities offering safe and clean conditions for visiting and opportunities to enjoy days & night activities, interacting and engaging more with local people' Many of the traditional conference and tourism programmes will not motivate this generation; but we must offer services that will satisfy the needs of ALL generations – without alienating anyone.' WYSE Travel Confederation

The changing patterns of travel that can be identified in the youth segment will influence the industry even further in the coming years. Looking at the future prognosis, the growth of the number of people seeking experiences rather than material things will create a great niche for cultural consumption to emerge as a significant facet of tourism. The Amadeus report 'Future Travel Tribes 2030' investigated the travelling patterns of the future- and indicated six different personas that will emerge by 2030. Most of these will be interested in cultural experiences as part of their trips.



Chapter 4.2 The tourism industry explained

Tourism is a very complex industry with a wide variety of key players, including public and private organisations and institutions that are coming together to provide the end-user tourist with a unique experience. To bring clarity to the way the industry works and in order to provide an understanding of how certain elements could benefit Europeana, it is important to structure, clarify and explain in-depth all the important elements of the tourism industry.

The tourism industry can be classified on the basis of the objectives of an organisation and it is valuable to identify the role of an organisation and its potential impact on distribution within the industry:

- Policy making: Activities on a national and international level focused on facilitating the conditions of the industry and creating an environment for businesses to prosper;
- Advocacy: Raising certain issues for decision-makers and influencing the development of related policies;
- Promotion: Raising awareness of issues that are important within the industry and making them known to the wider public;
- Branding and marketing: Developing a main message related to perceptions of the image held by a customer or potential customer regarding a product or service, and developing awareness of it among potential audiences;
- Selling travel products: Activity that involves the packaging of services to facilitate the experience of clients before, during and after travelling;
- Serving the consumer: Providing the supplies necessary for the maintenance of the experience of the tourist.

It is important to understand that while private sector organisations operate mostly internationally, public institutions and associations generally work within their own geographical region. The role with regards to tourism promotion and the direct involvement in tourist activities vary from a transnational to local level. The same applies to policy making and available budgets for the tourism product promotion.

Considering the nature of Europeana as a source of European cultural heritage, it is important to analyse different levels of the tourism industry from a European perspective, with the particular organisations of Europe in mind, as well as analysing individual service providers in the tourism industry.

All of this should be taken into consideration, as it has the potential to derive value from Europeana resources and to provide a reliable platform for communication. The best way to approach these tightly interconnected aspects of the industry is by analysing the structures and goals of the players mapped out in the following chart.



Chapter 4.2.1 Global policy makers and advocates

Chapter 4.2.1.1 United Nations World Tourism Organisation (UNWTO)

The United Nations World Tourism Organisation (UNWTO) is the United Nations agency in charge of the promotion of responsible, sustainable and universally accessible tourism. Declaring these goals, UNWTO supports the tourism industry by being a thought-leader on advancing knowledge and tourism policies, as well as raising awareness with regard to how tourism contributes to economic well-being. The organisation also plays a role in highlighting the importance of the quality of services and the revenue potential that tourism is able to offer.

Objectives and areas of focus

UNWTO works in six main areas - competitiveness, sustainability, poverty reduction, capacity building, partnerships and mainstreaming with the aim of achieving responsible, sustainable and universally accessible tourism. As the leading international organisation in the field of tourism, UNWTO has its own objectives related to the promotion of tourism including:

- Being a *driver of economic growth*: Tourism is an industry that is prominent in the world economy, and which has achieved a very sustainable growth during the past few years. Tourism is considered an essential part of the economy in a large number of developing countries, as it creates jobs and it offers huge support for economies.
- *Inclusive development*: Tourism is an industry that involves stakeholders and cross-industry development.
- *Environmental sustainability*: Tourism is an industry that respects and protects cultural and natural assets. Raising awareness of protected sites and the value of the resources, tourism is a sector devoted to the promotion of environmental sustainability.

The main goals for UNWTO are:

- Mainstreaming tourism in the global agenda;
- Improving tourism competitiveness;
- Promoting sustainable tourism development;
- Advancing the contribution of tourism to the reduction of poverty and general social development;
- Fostering knowledge, education and capacity building;
- Building partnerships;
- Supporting its Member States.

Membership in the organisation

The UNWTO's membership includes 156 countries, 6 Associate Members and over 450 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities. UNWTO has a particularly unique composition of both public and private sector institutions.

UNWTO has different bodies enabling the organisation to facilitate its functions. These are:

- General Assembly, which is the main gathering of the World Tourism Organisation. It meets every two years to approve the budget and programme of work and to debate topics of vital importance to the tourism sector. Every four years the General Assembly has the mandate to elect the Secretary-General, who is the permanent head of the Secretariat and the official representative of the UNWTO.
- Regional Commissions represent Africa, the Americas, East Asia and the Pacific, Europe, the Middle East and South Asia. The main mission of these organisations is to empower member States to maintain closer contact, and to communicate with the Secretariat with regard to raising concerns between sessions of the General Assembly.

- Executive Council is the governing board, responsible for ensuring that the organisational activities are carried out appropriately and that budget is adhered to.
- Committees are established with the purpose of advising on management and programme content. These include: the Programme and Budget Committee, the Committee on Statistics and the Tourism Satellite Account, the Committee on Tourism and Competitiveness, the Committee on Tourism and Sustainability, the World Committee on Tourism Ethics and the Committee for the Review of Applications for Affiliate Membership.
- The Secretariat, located in Madrid, is the headquarters of the officials who are responsible for implementing the UNWTO's programme of work and serving the needs of members.

Areas of operation

UNWTO is involved in a variety of activities dedicated to the main objectives and goals of tourism. It encourages the implementation of the Global Code of Ethics for Tourism, to maximise the industry's socio-economic contribution, while simultaneously minimising its possible negative impacts. It is also strongly committed to promoting tourism as an instrument in achieving the United Nations Millennium Development Goals, which are geared towards reducing poverty and fostering sustainable development.

The UNWTO generates market knowledge, promotes competitive and sustainable tourism policies and instruments, fosters tourism education and training, and works to make tourism an effective tool for development. Central to this are technical assistance projects in over 100 countries around the world. It is clear that over the last decade tourism has become increasingly recognised as a powerful tool for addressing global challenges such as climate change, employment, poverty eradication and sustainable development. The cross-cutting nature of tourism which leads to links with other economic sectors, positions it as an effective factor in global development strategies. Tourism is often one of the few competitive options enabling developing countries to participate in the global economy.

In terms of overall activities, the organisation mainly assists destinations in their sustainable positioning in complex national and international markets. By reducing poverty and establishing sustainable tourism businesses, the UNWTO is significantly focused on developing countries, helping them develop sustainability in tourism. The organisation contributes by helping them to strategise, organising networking events and raising the visibility of relatively obscure destinations. Tourism in many developing and less developed countries is the most viable and sustainable economic development option, and in some countries, the main source of foreign exchange earnings. Part of this income trickles down to various sectors of society, and if tourism is managed with a strong focus on poverty alleviation, it can directly benefit poorer groups through the employment of local people in tourism enterprises, goods and services provided to tourists, or the running of small and community-based enterprises, having a positive impact on the reduction of poverty levels.

Funding opportunities

The UNWTO has also various funding opportunities, for activities that comply with its organisational goals. The programmes are initiated by acting on requests from Member States. The UNWTO Technical Cooperation and Services unit carries out a wide range of projects – long-term as well as short-term – aimed at the promotion and development of tourism in developing and transitional countries.

These projects are implemented through funding obtained from a variety of major donor agencies such as the United Nations Development Programme, the World Bank, the European Union, the Asian Development Bank, several bilateral donors and other sources. The UNWTO Technical Cooperation and Services deploys the world's leading experts and firms in order to implement technical cooperation missions and projects.

The growing importance of the tourism industry and the efficiency of implemented projects were a highlighted topic in the 21st UNWTO General Assembly recently. There was a call for the need to have a holistic approach to the financing of tourism for development considering many linkages to the other activities along the value chain. There was an invitation for the international community to develop an approach to tourism financing that promotes cross-sector cooperation and solutions. Prospects for future assistance with tourism are bright, as the goal to harness its vast potential for stimulating green growth and inclusive development worldwide is clearly in demand.

Opportunities for Europeana

The main objectives of UNWTO are related to the promotion of the values of the United Nations, through tourism, and support for the sustainability of local cultures. This highlights the importance of cultural heritage as high on UNWTO's agenda.

There are a number of opportunities for Europeana to establish sustainable relationships with the global policy making tourism body. These include possibilities to join the knowledge network, participate in mutual workshops and events, cooperating with the tourism community in order to raise awareness, and partnerships on cultural tourism projects as well as UNWTO's thought leadership in the role of culture in tourism. The Europeana can also actively contribute as part of UNWTO's conferences and events which will further enable Europeana to build relationships with tourism ministers, tourism organisations and culture professionals.

UNWTO as an agency of the United Nations system is working closely with the United Nations Educational, Scientific and Cultural Organisation (UNESCO) to ensure a sustainable approach to heritage management and tourism. It has been highlighted that tourism can play a significant role in the preservation, conservation and promotion of cultural and natural assets. Close cooperation with UNESCO is an important factor in conveying the message of the importance of culture in tourism on a global policy-making level.

As UNWTO is not involved in the direct promotion of products, re-using Europeana on a large scale can be considered dubious. However, considering the visibility and credibility that the organisation has in the tourism industry, it may be worth considering reaching out to the wider community within the industry. As culture is high on the agenda within UNWTO, there is a potential synergy in this partnership, and from Europeana's perspective, this could serve as a well-established and credible platform to raise awareness.

Exploring the knowledge network could be a great possibility for Europeana; it is a space where UNWTO members have a common space at their disposal to interact, share and access relevant information. More importantly, they benefit from an unparalleled platform to create, disseminate and apply their knowledge resources in a manner which enables them to play a prominent role in shaping the future of the tourism sector.

The UNWTO Silk Road Programme is well-established within the international tourism community cultural tourism project. It is worthwhile for Europeana to explore this project further, as it aims to maximise the benefits of tourism development for local Silk Road communities, while stimulating investment and promoting the conservation of the route's natural and cultural heritage. As a unique network of destinations linked by a common cultural heritage, the Silk Road presents significant opportunities for collaborative marketing and promotional initiatives.

Over the years, UNWTO has collaborated with major international travel fairs on numerous promotional activities intended to highlight the tourism potential of the Silk Road. ITB Berlin (International Tourism Trade Fair Berlin) is the established meeting place for Silk Road Ministers, as they convene annually to address key challenges and opportunities for cooperation. Social media activity continues to increase, with the Silk Road events being held on an annual basis within the context of WTM's (World Travel Market) Social Media Mart. Bloggers have competed

to create innovative Silk Road blogs, and the winners have been sent across the Silk Road to promote its multiple attractions.

With vast resources on cultural heritage, Europeana is ready to share this with the tourism community, and it is worth considering the development of tourism datasets that would be of value for UNWTO's member organisations. As Europeana currently might not have close relationships to representatives of UNWTO, it is recommended to actively engage with UNWTO as part of events, workshops, trade shows as well as social media in view of establishing relationships. Establishing a meeting with a UNWTO representative in charge of culture and tourism as part of a major travel trade show is highly recommended. The Europeana can introduce its organisation and also explore where there are opportunities for Europeana to be more closely aligned with UNWTO's activities.

Chapter 4.2.1.2 World Youth and Student Educational Travel Confederation (WYSE Travel Confederation)

The World Youth Student and Educational (WYSE) Travel Confederation is a global non-profit organisation that serves as a platform for tourism businesses engaged in promoting and developing opportunities for young travellers, and the youth, student and educational travel industry that serves them.

WYSE Travel Confederation was founded in 2006 through the merger of the Federation of International Youth Travel Organisations (FIYTO) and the International Student Travel Confederation (ISTC) in order to create a stronger united body to represent the global youth travel industry. The WYSE Travel Confederation is therefore built on decades of experience and is recognised as being both long-standing and trusted in the global community. ISTC (founded 1949) and FIYTO (founded 1950) were formed amid post-war efforts to foster peace and cultural understanding through social tourism.

Youth Travel Industry

World Youth Student and Educational (WYSE) Travel Confederation is the world's most important network organisation of youth and student travel operators. The organisation is dedicated to supporting this unique market, which generated an estimated USD 250 billion in 2014. The global youth travel industry is now estimated to represent almost 190 million international trips a year, and has grown faster than global travel overall. By 2020, young travellers will take 320 million international trips. This will be a huge 47% increase from the 217 million trips that were taken in 2013.

The philosophy of the predecessor organisations of WYSE Travel Confederation provided the inspiration for it, and a foundation for the core values of the organisation. These are based on a belief that student travel and the exchange of ideas encourages and contributes positively to education, and plays an important role in developing greater international understanding. FIYTO and ISTC advocated the special identity of student travellers, and the need for affordable and specialised student travel services that enabled international youth mobility. Youth travel is a vibrant industry that was hugely influenced by these organisations and their mission to promote cultural understanding and world peace by inspiring young people to travel. Culture is the central focus of youth travel, although it is likely to be understood in broader terms; not merely cultural heritage, but also cultural experiences through people.

The connection with someone when they're young influences their future travel intentions. For example, if a destination can capture a traveller at a young age, it is possible to encourage them to return as they grow older, and thereby bring increased value to a destination. There is also the

possibility that some may even choose to become citizens, bringing in a lifetime's worth of tax investment to the country.

According to the research carried out by UNWTO and WYSE Travel Confederation, youth travel has moved far beyond its original status and is no longer considered a niche aspect of the travel industry, but instead is a big part of the tourism industry in most destinations. Youth Travel is a unique market and it is important for the industry to be able to share insights, practises and experience, and also to use the organisation dedicated for promotion of the industry internationally in order to place more importance on youth travel when talking to governments and other international organisations.

Objectives

WYSE Travel Confederation is working towards an understanding of the ever-changing characteristics, motivations and needs of young travellers. By gathering, analysing and sharing important market intelligence with members, academics and government decision-makers, they grasp every opportunity to understand the unique and rapidly evolving needs of the youth market, managing to keep it at the forefront of their activities.

Youth travel not only contributes to the economy, it also combines social and cultural benefits that are vitally important for any destination, and which should be a focal point of the industry's overarching strategy. Yet nations around the world are still failing to recognise the significance of youth travel - poor policy frameworks and a lack of capacity building programmes that foster development and growth are particularly noteworthy. The industry itself has to face challenges related to operating environments.

Being the main hub of intelligence on youth travel, WYSE Travel Confederation also focuses on establishing itself as the respected advocate, supporter of industry and a major partner of business, helping to effectively manage teams of youth travel professionals. The key objectives of the WYSE Travel Confederation are to:

- Promote the personal, social, economic and cultural benefits of youth travel and international education;
- Support the development of student and youth travel specialists, and the critical role they play in this unique USD 250 billion market;
- Provide trading, networking and knowledge-sharing platforms;
- Develop innovative travel and educational products and services for youth and students, such as the International Student Identity Card;
- Deliver two essential trade conferences - the World Youth and Student Travel Conference and the Work Experience Travel Market;
- Produce and distribute research and market intelligence to identify the unique needs and trends of today's independent travellers;
- Provide the best practice guidelines on products and policies;
- Represent members at industry events worldwide.

Membership in the organisation

WYSE Travel Confederation is an umbrella organisation consolidating four major sector organisations in travel:

- *Study WYSE* providing specialist industry support to youth and student travel organisations engaging in study abroad and language travel industry worldwide;
- *International Au Pair Association* the membership of this organisation is open to agencies, associations and authorities actively engaged in the au pair and cultural exchange industry;
- *WYSE Work and Volunteer Abroad* is open to members who engage in providing opportunities for work abroad and volunteer experiences and the international education of students;

- *WYSE Stay* is an organisation open to all types of student and youth travel accommodation providers, regardless of their size, as well as other official tourism organisations and suppliers of goods and services to the student and youth travel accommodation industry.

The Members of WYSE Travel Confederation are leading the industry in unique types of travel products and services that young people utilise, such as:

- Adventure Tour Operators
- Au Pair Agencies
- Cultural Exchange Programmes
- Hop-on, Hop-off Buses
- Language Schools and Agents
- Student Insurance, Flights and Identity Cards
- Universities, International Education, and Study Abroad Programmes
- Volunteer and Work Abroad Programmes
- Youth Hostels and Online Booking Engines
- Youth and Student Travel Retailers.

Among the members of WYSE, there are plenty of major players in the youth travel industry, such as STA Travel, Oyster, TrekAmerica, Go Abroad, American Institute for Foreign Study, Atout France, Erasmus Student Network, ICEF, ISIC, STAR Travel and many others. This makes WYSE a well-established organisation and the thought-leader in the industry, being the first choice to acquire expert advice on the patterns young travellers are likely to engage in.

Opportunities for Europeana

The youth travel sector is a growing and fast-changing industry, where the old models of selling tourism are dying quickly. To be among the front-runners and influencers requires dedication and a very deep, thorough knowledge of the latest trends and core-specific industry principals. In order to understand and become equipped to target this huge market segment, the intelligence accumulated by WYSE Travel Confederation is vital for Europeana, as WYSE is certainly at the core of the future of the tourism industry.

Cultural heritage might not always be the most appealing incentive to travel for young people, and exploring the sights in conventional ways certainly is not a top priority for them. But insights and knowledge of the patterns, that are the specialties of WYSE Travel Confederation, may contribute invaluable ideas on how to address this segment and how institutions of cultural heritage should engage with young people.

Visibility and prominence within the global travel industry make WYSE Travel Confederation not only a potential channel for raising awareness of cultural tourism products, but also a valuable platform for communication and the opportunity to reach the industry as a whole by being viewed as a credible source of information.

Potential partnerships with the organisation, or some of the members that are influential, might lead to more benefits, and could add value for Europeana as a leading organisation for digitalised cultural heritage. The potential of this partnership is based on culture as a central focal point of both organisations, with WYSE Travel Confederation being interested in cultural exchange and Europeana trying to make culture more accessible for everyone.

Chapter 4.2.1.3 World Tourism Trade Council (WTTC)

The World Travel & Tourism Council (WTTC) is the global authority on the economic and social contribution of Travel & Tourism, dedicated to the promotion of sustainable growth for the sector, working with governments and international institutions to create jobs, drive exports and to

generate prosperity. The Council is a membership organisation of tourism industry leaders, uniting the most prominent personalities within the tourism trade.

Objectives

WTTC is organised as a forum for business leaders in the travel and tourism industry. With Chief Executives of some one hundred of the world's leading travel companies as its members, the WTTC has a unique mandate and overview of all matters related to the tourism industry. WTTC work to raise awareness of travel and tourism as one of the world's largest industries, supporting 277 million jobs and generating 9.8% of world GDP.

Membership and areas of operation

WTTC is the forum for the Chairs, Presidents and CEOs of one hundred of the world's foremost travel and tourism companies. Membership of the Council is by invitation only, although the Membership Committee considers expressions of interest from individuals who are prepared to devote the necessary financial and other resources to support the mission of the council. Top priorities of the organisation are focused mainly on advocating based on a travel business perspective, with a clear focus on sustainability.

Organisation's core goals:

1. *Freedom to travel*: The essential goal that makes the business possible is the availability to move without restrictions or over complication of procedures. This is the core element of the tourism business, and the WTTC is focused on easing policies related to it.
2. *Growth policies*: Tourism is a great stimulus for development and economic growth, so for governments to implement policies that ensure the business environment is conducive to the growth of travel & tourism. This means planning and investing in appropriate infrastructure and creating a tax regime which allows the private sector to be competitive.
3. *Sustainable tourism*: Growth of the tourism sector is managed responsibly, finding the balance between people, planet and profits. The WTTC continues to promote the very best in sustainable tourism through our Tourism for Tomorrow Awards. Members' global reach means that they are in a unique position to drive greener practices into core business models.

Opportunities for Europeana

Being a well-established advocacy organisation with strong support from UNWTO, and working with regional institutions, such as ETC, WTTC is thus a valuable industry player to consider, for any organisation seeking platforms either to disseminate information or form sustainable partnerships.

The organisation is very clearly focused on the sustainability of the industry, and as cultural heritage is one of the most valuable elements there is a great incentive for Europeana to consider this organisation. Firstly, it is interesting to explore the resources that they are able to provide, from trends in the sector to policies around the world that are important for tourism. Being a well-established and respected organisation within the travel business, WTTC could be considered for a partnership as it will provide access to members; effectively the most prominent industry players in tourism globally.

Sustainability in tourism and cultural heritage are closely connected; preserving culture increases the sustainability of the industry. Being a digital resource for cultural heritage, Europeana is a good example for the industry to adopt with regard to a sustainability agenda, and might serve as an inspiration for members of WTTC.

Also, tourism is considered to be a force that brings together people and cultures from all over the world, it creates links between different industries that collaborate with regard to tourism.

Potential channels to convey the Europeana message to are the events organised by WTTC, newsletters and websites that have credibility among the tourism society, potentially leading towards closer cooperation with member organisations and institutions. Having a strong focus on preserving a natural environment, looking after cultural heritage, and ensuring equal opportunities to local communities in its activities, the WTTC is a potentially valuable partner raising visibility and awareness of the tourism industry.

As the Europeana is only starting to venture into tourism and WTTC being one of the most influential tourism industry organisation, it is recommended to consider a strategic partnership quite carefully. Europeana should establish itself first as a credible driver of culture in tourism, being able to propose a clear agenda for the consideration of WTTC.

Chapter 4.2.2 Regional promotion and policy making

Regional promotion and policy making organisations are focused entirely on Europe and can be considered as important umbrella organisations, representing the needs of their members on a trans-European level. Exploring the way in which these organisations work and their influence on policy making and tourism advocacy on a political level can help the Europeana to understand how Europeana and its resources might fit in.

Chapter 4.2.2.1 European Travel Commission (ETC)

The European Travel Commission was founded in Norway in 1948. More than 60 years since its foundation, ETC's core task has remained unchanged - namely the international promotion of Europe as a tourist destination. ETC is a non-profit organisation responsible for the promotion of Europe as a tourist destination in long-haul markets. ETC's mission is to strengthen the sustainable development of Europe as a tourist destination and to increase competitiveness, through knowledge-gathering and sharing among members and lobbyists, as well as via establishing a professional marketing platform for the successful promotion of member countries in overseas markets. ETC currently promotes and markets the 'Europe – a never-ending journey' brand and the VisitEurope.com portal in four major overseas markets: Brazil, Canada, China and the USA. ETC's focus will shift gradually towards emerging markets in the coming years.

Objectives of ETC

The main objectives of the European Travel Commission are to:

- Promote Europe as an attractive tourist destination;
- Assist member NTOs to exchange knowledge and work collaboratively;
- Provide industry partners and other interested parties with easy access to material & statistics regarding inbound tourism to Europe.

Activities & finance

[ETC has been promoting Europe internationally for over 60 years](#) and currently undertakes the following activities:

- Public relations;
- Consumer advertising in selected overseas markets;
- Trade Promotions;
- Market Research;
- Professional development for members (seminars, information exchange);
- Liaison with other relevant agencies (e.g; the European Commission's Tourism Unit (DG Enterprise), the United Nations World Tourism Organisation (UNWTO), and the Organisation for Economic Co-Operation & Development (OECD).

These activities are financed entirely by Members' contributions, calculated according to a set of pre-agreed criteria. Additional financial support for specific campaigns is raised overseas. Long-

standing local industry support for ETC's activities is proof of its credibility in the field. ETC's seed money is multiplied annually by two, three or even four times.

ETC is working closely with the tourism industry as part of regular partnerships on an ad hoc basis for particular campaigns, such as:

- The development of the interactive VisitEurope application, that enables users to easily discover the range of destinations and experiences that Europe has to offer by browsing high-quality images, videos and user-generated content in an interactive map. This was developed in partnership with one of the significant players in the tourism industry, Amadeus.
- Established partnerships with tourism organisations, such as the European region of Airports Council International, the Foundation of European sustainable tourism, the World Trade and Tourism Council, the European Tour Operators Association, etc.

Membership in ETC

Currently, ETC has 33 members:

European Union: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain, Sweden.

Others: Iceland, Monaco, Montenegro, Norway, San Marino, Serbia, Switzerland, Turkey.

Organisational structure

ETC has its headquarters in Brussels, where its Executive Unit is based. The organisation is headed by a president elected from the directors of its member organisations. Vital to ETC's activities are its Market Intelligence Group (MIG) and e-Marketing Network (eMN). The MIG commissions and produces studies, handbooks on methodologies and best practice, and facilitates the exchange of European tourism statistics. The eMN provides information and expertise about the use of digital media by NTOs. The work on all activities is carried out by experts from member NTOs.

The representatives of the European NTOs operating in these markets join together to form an ETC Operations Group (OG) and elect a chairman. They decide on a programme of joint activities for the promotion of Europe for the year ahead, propose a budget, and seek local industry support.

ETC also provides a forum for the Directors of the European NTOs to meet regularly and exchange ideas. It is in constant touch with all international organisations and with people working in tourism.



Opportunities for Europeana

ETC is focusing on the promotion of Europe as a destination, with cultural heritage being a big part of this. There might be an opportunity for ETC to use the resources Europeana is able to provide for marketing purposes. Europeana provides a great amount of content on the same focal points that ETC is using for the destination Europe promotion such as famous artworks, rich history, cultural highlights and gastronomy. Integrating Europeana for promotional purposes could be beneficial for both organisations. For example, the content from Europeana could potentially be used in the main promotional online tool of ETC, the portal visiteurope.com, or integrated into the mobile application, developed by ETC [VisitEurope](#).

The other benefit of potential cooperation between Europeana and ETC is the ability to improve the visibility of content available through the tourism industry. ETC has a close relationship with the European NTOs who are members, and as they organise events and meetings on a regular basis they should be considered as a reliable communication platform to promote pan-European projects, such as Europeana.

ETC is an important direct link to its members, the 33 national tourism organisations, that have a close relationship with ETC to drive the promotion of Europe as a tourism destination to selected long-haul markets. When considering a partnership with ETC, it is important to consider that for them, the focus is on putting together promotional activities that can help to raise the awareness of Europe as a destination, driving visitors to its member nations. Tapping into readily available content that can easily be re-used is a crucial component for them. The content they utilise for campaigns is mostly submitted by their NTO members. However, there are certain themes and specific collections that could be interesting for several NTOs at the same time such as the Vikings or Royal families.

For Europeana this is a great way of partnering up with ETC, working together with them and their NTO members to deliver specifically curated content that can support the delivery of targeted campaigns for specific markets. Due to the nature of Europeana's content, there is a clear added value for ETC and its members to work with the Europeana.

In addition, ETC also need to bring added value for its members, so any opportunities where ETC can be a part of bringing an advantage to its NTO members is considered advantageous for them too. It could be valuable to explore the opportunity to work towards closer cooperation with ETC on a regular basis, as Europeana is a content provider that suits ETC's needs. In return, ETC could serve as one of the agents disseminating the message about the potential of Europeana for the tourism industry, raising the awareness and profile of Europeana further.

Chapter 4.2.2.2 European Tour Operator Organisation (ETOA)

The European Tour Operators Organisation (ETOA) is the leading trade association for tour operators and suppliers of tourism services with businesses in Europe. It is a well-established organisation, that brings many important players in Europe together. It serves as a platform for exchanging business practises, an advocacy for important policy issues, and a networking and contracting platform for tourism professionals through B2B events. The organisation provides advocacy support on a European level, high-profile industry campaigns, and B2B marketing representation opportunities. A partnership with the European Travel Commission was announced recently, with the aim of promoting Europe as the number one tourist destination globally.

Goals and objectives

Operating as an Association, ETOA has certain objectives and goals that the establishment is working towards:

- Establishing relations with the European Institutions (the European Commission, the European Parliament, Council of the European Union and the Committees);
- Acting as a forum for international inbound tour operators based in Europe;
- Providing advice, technical training and marketing services to members seeking advice and assistance;
- Maintaining good relations with suppliers to the tour operators industry;
- Monitoring and establish operating standards of its members to ensure the highest standards of service;
- Coordinating, representing and promoting the interests of members nationally, internationally and locally, and those of other interested parties, to government, national and regional bodies, and others concerned with any aspects of members' businesses;
- Promoting Europe as a tourist destination;
- Raising awareness of the impact of tourism on the environment, and encouraging members to focus on improving environmental practices.

ETOA is a well-established organisation, that is dedicated to the improvement of the tourism business environment within Europe, and the organisation mainly engages in two streams of activities - events and policy-making.

There are prominent B2B events, where the businesses participating in the workshops meet up. At these events, due to an innovative approach and a format of a 'speed-dating' style arrangement, tourism buyers are able to congregate with tourism suppliers from across Europe to make initial introductions or to build on existing relationships. Before a workshop, delegates are contacted with the names of companies, and are asked to name the businesses with whom they wish to meet. Using all of the gathered information, each delegate is then assigned as many appropriate appointments as possible, and that provides the opportunity to maximise contacts via the event.

ETOA is also dedicated to education and learning, so there is a variety of events taking place which are focused on providing members with the possibility to acquire knowledge on the latest trends in the industry. These events are intended to provide participants with a competitive advantage. The variety of different events represents a good platform for members to network, increase knowledge, exchange ideas and form sustainable partnerships.

However, another important area ETOA is very active in is advocacy and influence over policy-making; this has been achieved steadily over the years, as the organisation has achieved a level of authority in the sector. Currently, it is also a big part of ETOA activities, with a specific focus on the goal of facilitating conditions for tourism business to be conducted, as well as making travelling to Europe more convenient.

Membership and organisational structure

ETOA currently has 700 members who contribute more than €12 billion of business within Europe. These include tour and online operators, intermediaries and wholesalers, European tourist boards, hotels, attractions and other tourism industry players. These members collectively take advantage of a variety of different activities, which are intended to enable them to increase their competitiveness.

Such events include exchanging knowledge, acquiring advice, having access to industry partner events, enhancing reputation, being promoted through the wide circulation of a newsletter, the increasing of B2B marketing options, and benefitting from networking. These elements generally increase the visibility of a business, and members are also able to influence campaigns that are important for their particular business.

The Secretariat of ETOA is located in London and is responsible for the day-to-day running of the association's affairs, such as the arrangement of committee meetings, events management and marketing, maintaining the website, and communicating with members. In addition, ETOA runs a number of Committees and has its own Constitution. The Committees give ETOA members the chance to have a real say in the various activities of the association and the issues which affect them. Committee meetings are held regularly throughout the year. Active committees include the Steering Committee, the Events Committee and the Sales & Marketing Committee.



Opportunities for Europeana

Considering that one of the main goals of ETOA is to promote Europe as a destination and strengthen European values, cultural tourism has great potential to be a part of this process. As Europeana is a great resource for cultural heritage, it is worth considering exploring opportunities in order to offer Europeana and tourism datasets as a tool for ETOA members, who are engaged in cultural tourism.

The great number of events organised by ETOA have great potential to raise the visibility of Europeana and deliver a suitable message to the tourism industry, as tour operators and destinations are constantly looking for unique and inspiring content. Europeana should explore the possibility of participating in their events, workshops and education events as a priority.

The newsletter that circulates among ETOA members and outsiders is also a potential channel for Europeana to spread information and their message. ETOA is a great platform to increase the prominence of European culture and highlight the value of it to major tourism industry players.

Chapter 4.2.2.3 European Cities Marketing (ECM)

European Cities Marketing (ECM) is a non-profit organisation intent on improving the competitiveness and performance of the leading cities of Europe. ECM provides a platform for conventions, leisure and city marketing professionals to exchange knowledge, best practises and widen their network to build new business for their organisations. Culture has always been a big part of marketing cities, and this is why it is very important to understand trends related to it, as well as the potential of employing cultural heritage for the overall promotion of cities.

Goals and Activities

ECM is a non-profit membership association dedicated to strengthening and improving European City Marketing. The main goals of ECM are to:

- Focus on opportunities and work on breakthrough solutions to obtain growth;
- Provide essential research, insights and tools to benchmark city performance;
- Improve operational efficiency and make better business decisions;
- Provide useful platforms and forums to exchange knowledge and best practices;
- Develop a European City brand that enables pan-European city marketing approaches in niche and new growth markets;
- Develop people and nurture future leaders for European Cities;
- Embrace CSR/Sustainable tourism.

To achieve the objectives ECM is taking a wide variety of different approaches:

- Platforms are provided through conferences and forums, as well as gathering together knowledge groups and organising CEO events.
- Insights, research and analysis create immense value for members; they form a critical part of the capability and the potential of this association. Cities are able to benchmark themselves in terms of their performance in the meetings industry, their finance and sponsorship structures and their bed-nights and spend amongst other things. It is also very important for cities, as 50% of the member cities of ECM do not have their own research departments and use ECM data as a unique and essential source of information, and this has a positive impact on prioritising their activities within budget constraints.
- Knowledge exchange platform: ECM is not only sharing acquired knowledge, but also encouraging members to circulate knowledge within.
- Representing cities and mediate talks with policy-makers: there are different ways that local politicians, local industry, local members and relevant associations need to come on board for city development, and ECM helps members to drive the message that urban tourism is critical not only to the success of cities themselves, but nations and regions.

- Has a role in education: understanding the importance of human resources has led to different initiatives within the organisation, contributing to the development of people and initiating programs that focus on future leaders, as well as facilitating the training of Tourism Information Centres through a specifically designated event.

Membership

The members of ECM are currently 80 leading cities in 30 countries around Europe. Membership is granted to City Tourism Organisations, Convention and Visitor Bureaux and City Marketing Organisations, with most organisation tending to be represented by their CEOs, senior directors and foremost experts. To qualify as a member of ECM, a European city represented by its organisation must meet at least two of the following criteria:

- More than 3,000 beds or 1,500 rooms in commercial accommodation;
- The capacity to host a meeting of at least 300 delegates in one plenary room, providing sufficient supporting facilities for breakout and catering;
- At least three international meetings per year with a minimum of 300 delegates hailing from at least three countries during the last three years.

ECM members are official tourist offices, convention bureau and multi-functional urban marketing agencies established by cities in Europe. They are official in the sense that they are constituted either as the departments of the city government or public-private partnerships (i.e. companies, foundations etc.). Full members may be elected to the Board. They have the right to vote at the ordinary and extraordinary General Assembly

Organisational structure

ECM as a whole is governed by its Board as the top management of the network. The Executive Committee of the Board is composed of the President, two Vice-Presidents (one dedicated to the Meetings Industry and one to the Leisure Industry) and the Treasurer, all of whom are ready to act at any time. Other ECM members complete the Board to its plenum of 14 members. The three-year terms of the Board members overlap, in order to avoid a board consisting only of newcomers.

The Head Office responds to members' needs with the delivery of programmes of activities and events. The services provided can be seen as meeting diverse member needs, and these range from research and education, through networking and business development.

Opportunities for Europeana

As the main activity of ECM is to facilitate marketing for the member cities, they are not only the experts in the field, but have also built up a reputation in knowledge exchange and accumulated a wide network of partners. This is the major asset for the Europeana and it is important to get familiar with these prevailing trends and position cultural heritage appropriately in the city marketing sector. Furthermore, it is also a credible source of prevailing trends in the tourism industry and a platform capable of raising awareness of Europeana resources that are currently available for city tourism boards and tourism information centres.

There are a number of communication channels that could be useful for Europeana within ECM as a platform:

- *Networking and business development*: The organisational structure of ECM provides a very important platform to meet and target cities, to identify the needs and prepare content that could be placed on-demand by marketers.
- *Conferences*: Places for knowledge exchange that can provide a unique platform to raise awareness and visibility among cities and members.

- *Forums, knowledge groups and CEO events*: Provide easy access to the leaders of city marketing, and are places to target decision-makers to get a buy-in on using Europeana as a content source
- *Newsletter*: Offers the possibility to reach a wide audience that is directly involved in city marketing.

The Europeana should establish a relationship with ECM, looking at the potential of a fruitful cooperation. For ECM, it is important to understand what the added value is for them as an organisation is as well as for their members. Exploring the potential of cooperating with ECM is a very important step in the journey of targeting all relevant stakeholders within the tourism industry, as culture has always been an important component in city marketing.

Chapter 4.2.2.4 The European Commission (EC)

The European Commission (EC) is the executive body of the European Union, working on different areas of policy making. It is the main legislator that exercises this right independently, or with the European Parliament in compliance with existing treaties. Within the Commission there are numerous departments with a variety of objectives, known as Directorates-General (DG). The DG that has a tourism portfolio is the DG for Internal Market, Industry, Entrepreneurship and SMEs, also known as DG Growth. This organisation represents the European Union (EU) in its activities. However, the European Commission is having an impact on tourism that is not nevertheless often not considered to be a part of the tourism industry, due to a limited participation in direct activities. It is therefore important to analyse the role and impact of the European Commission on tourism, in order to understand the policy making objectives, and to uncover the future development prospects of this organisation.

The policy in tourism

EU policy aims to maintain Europe as a leading tourism destination in the world while maximising the industry's contribution to growth and employment. The promotion of cooperation between EU countries, particularly through the exchange of good practice, is also high on the political agenda of the organisation. The EU's competence in tourism can broadly be described as one of support and coordination in order to supplement the actions of member countries.

Goals and objectives

There are several ways for the Commission to be involved in tourism. It provides financing for activities through a variety of different programs, it is heavily involved in tourism policy making, and occasionally it partners with the European Travel Commission to promote Europe as a tourism destination.

Since 2012, the Commission has co-financed the preparation and implementation of a dedicated Destination Europe 2020 strategy – a programme of activities designed to increase the visibility of Europe as a destination in key long-haul markets. The Commission and the ETC have also joined forces to meet with businesses and potential tourists at major international events and travel fairs.

The European objectives in the area of tourism-related policy making are:

- Enhancing what European tourism has to offer;
- Supporting tourism business;
- Promoting Destination Europe;
- Facilitating international cooperation;
- Organising conferences and events;

In June 2010, the European Commission adopted the ethos set out in the communication: ['Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe'](#). This communication set out a new strategy and action plan for EU tourism.

Four priorities for action were identified:

- *To stimulate competitiveness* in the European tourism sector, which means that European tourism should innovate and offer the highest quality products in order to be competitive in a rapidly changing industry;
- *To promote the development of sustainable, responsible, and high-quality tourism* - these define the main areas in which Europe has the greatest potential to be a front runner in the world tourism market;
- *To consolidate Europe's image* as a collection of sustainable, high-quality destinations - visual content has the greatest value in promotion, thus a collection of images featuring the most significant highlights of destinations is crucial;
- *To maximise the potential of EU financial policies for developing tourism* - the will to increase financial support for tourism initiatives will move the sector towards being more competitive.

Opportunities for Europeana

The EU recognises the importance of culture as a part of the European tourism experience, and as an element that can enhance the profile of Europe as a global destination. The European Commission supports cultural tourism as a catalyst for industry growth. Europe is a key cultural tourism destination due to its incomparable cultural heritage that includes museums, theatres, archaeological sites, historical cities, industrial sites, alongside music and gastronomy. It is estimated that cultural tourism accounts for 40% of all European tourism, with 4 out of 10 tourists choosing their destination based on its cultural offerings.

The EU promotes a balanced approach, combining the need to boost growth on one side, with the preservation of artefacts, historical sites and local traditions on the other. As a policy making and financing body of Europeana, the European Commission is a major contributor to all of the activities that have been carried out already.

The European Commission is not a body that is able to contribute directly to assisting Europeana to find its place in the industry, but it is certainly a reliable platform for raise its awareness and visibility.

- There are different initiatives that could combine and incorporate Europeana in their agenda. This could create synergies in the industry, yet many are not currently aware of Europeana's potential. As an example, the Virtual Tourism Laboratory offers support for tourism business and relations with other international organisations. The European Commission has recently relaunched the laboratory as a repository of statistical information, reports and information on policy and legislation relevant to the EU tourism sector.
- The European Commission's Virtual Tourism Observatory aims to support policy makers and businesses develop better strategies for a more competitive European tourism sector. The Virtual Tourism Observatory provides access to a broad collection of information, data and analysis on current trends in the tourism sector. This could also include links for a Europeana database or Europeana Labs and provide information about available resources, or even generate different datasets for tourism which correspond to the latest travel trends.
- The European Tourism Forum is an annual event, which is co-organised with the particular country that holds the Presidency of the Council of the European Union during the second half of the year. The Forum's objectives are political and they are often linked to an informal meeting of Ministers responsible for tourism from EU countries. Using this platform to address tourism, policy-makers could enormously increase the visibility of the Europeana Network.
- The EU promotes cultural heritage, but incorporating the right balance in overall activities could be beneficial for different parties. For example, while providing support for travel

businesses, the European Commission could potentially encourage usage of Europeana data in their own activities.

- The European Commission works closely with 'European Cultural Routes'. These are transnational routes helping tourists to discover how Europeans have lived since ancient times. The European Commission actively cooperates with the Council of Europe and could potentially act as an intermediary for initiating dialog between Europeana and the Council of Europe.

There are numerous ways for Europeana to work closely with the European Commission not only as a funding body, but also as a platform to reach out to help achieve general cooperation in the tourism industry.

Chapter 4.2.3 National tourism promotion: marketing and branding

National and city tourism organisations are often working in collaboration with their nations or city's cultural department but there are opportunities to inspire further cross-sectoral cooperations on a national and city level.

Chapter 4.2.3.1 National Tourism Organisation (NTO)

To facilitate the process of managing a country's tourism reputation, the function of tourism promotion and image formation is delegated to specific government designated bodies, which are widely known as National Tourism Organisations (NTOs). NTOs are the main institutions within every country that are dedicated to the promotion of inbound tourism abroad and branding the country as an attractive tourism destination. Planning and facilitating the tourism industry by establishing guidelines and an appropriate legal environment for the growth of tourism is also part of NTOs activities, but mainly it has an advisory role for government policy makers.

There are different structures involved in the numerous NTOs, as well as various financing models and roles in policy making models. As a body financed by public funds, many NTOs struggle to be flexible in the decision-making process, and also to adapt to the rapidly changing tourism market. On the other hand, as NTOs are dedicated to the promotion of a country as an attractive travel destination, but not solely focused on the revenue the tourists are bringing, the organisations can also afford to work on non-profit projects that increase the prominence of the country.

Objectives and key activities

Tourism management within these public bodies on a national level are focused on three main activities:

- *Tourism market surveillance:* Service providers are an important part of the tourism sector and NTO's are highly interested in the quality of services offered. Often this is left outside the direct activity of the NTOs, but it is crucially important to be able to participate to some level.
- *Policy making:* Tourism policy in most cases is conducted within governments, but NTOs as experts in the field often have an advisory role in tourism policy making.
- *Inbound tourism promotion:* Branding of the country for foreign markets using different information distribution channels and activities is the most important part of the work NTOs do.

The distribution of activities amongst public bodies, dedicated to targeting these key areas, differs from country to country. But the models committed to destination promotion are as follows:

- NTO is a part of the governmental structure, a ministry of tourism or an independent body in the system of the ministry
- NTO is a public enterprise or agency devoted to the promotion of tourism, where the ownership is maintained by the governmental institution

NTOs throughout Europe are financed by governments, through different funds within the European Union, and in some cases they are working in partnership with private sector institutions that are contributing to the promotion of the destination.

The main activities of NTOs are as follows:

- *Country branding* which are all of the activities dedicated to promote the branding of a country and activity related to tourism specifically;
- *Raising awareness and visibility* of the country as a tourism destination, and taking the responsibility to increase the country's prominence through a number of tourism-related events;
- *Research of tourism trends* and gathering statistical data and working with national statistics offices, and being abreast of regularly changing trends;
- *Involvement in tourism policy making*: policy making is usually reserved for the governmental body, NTOs operate in an advisory capacity for policy makers;
- *Planning marketing activities*: NTOs are often centrally involved in the planning of marketing activities, with the organisations tending to follow long-term strategies and assess historical data;
- *Implementing marketing activities*: following well-established strategies and engaging in activities accordingly, such as:
 - Organising promotional campaigns in target markets: as a part of well-established strategies and marketing plans, the organisation is often placed in charge of the holistic process of running a campaign within target markets.
 - Coordinating the activities of the regional tourism offices and city tourism boards: working together with the regional offices on different projects and coordinating a unanimous message towards them.
 - Organising press trips to promote tourism destination in foreign media: as a part of marketing strategy, gaining access to thematically-focused representatives of foreign media from respected channels.
 - Representing tourism destinations in international events: organising B2B events in the format of workshops or roadshows.
 - Promoting improvement in the quality of facilities for visitors: NTO are involved through different channels in developing the quality of infrastructure for visitors.
 - Operating PR agencies in foreign countries that represent tourism opportunities abroad.

Opportunities for Europeana

There are three key points regarding the potential of Europeana related to NTOs:

- Culture is a big part of promotional content throughout Europe;
- Unique materials within Europeana provide the destination with a competitive advantage;
- Availability of the content makes it easy to use in the marketing of the destination.

NTOs throughout Europe are central bodies distributing messages internationally regarding the potential of the country's tourism resources. Considering that culture is one of the major motivators for people to travel to destinations in a great majority of European destinations, there is the potential for Europeana to be utilised in the country's marketing campaigns.

There is a great competition between destinations trying to offer a unique tourism experience. Looking for exclusive information about destinations is one of the main goals in the everyday activities of NTOs. With its ability to offer an extensive database of cultural heritage resources, that could potentially be linked to specific destinations, Europeana could be an inspirational and unique selling point for country promotion.

NTOs have specific budgets that are used for the promotion of destinations, and they carry out different marketing activities via these budgets. Europeana resources can be useful in promoting countries as cultural destinations via multi-channels, such as: creating websites, creating mobile apps, printing brochures, looking for unique content to promote at the country's stands and display as part of international tourism trade shows, etc.

Chapter 4.2.3.2 City Tourism Organisation (CTO)

A City Tourism Board (CTO) is a public body responsible for the promotion of city tourism, which provides information for end users, operating within the municipality structure or being the entity established by the municipality. They usually engage in a variety of activities to promote cities as attractive destinations for tourists by highlighting available attractions, providing tourists with information on places of interest, as well as facilities that serve the needs of groups or individual travellers. CTOs work very closely with Tourism Information Centres (TIC) and these are either a part of the city tourism board structure or an external entity.

Financing

The role of CTOs in the promotion of cities is important, but it is not the only activity that they are engaged in. CTOs as self-sustaining entities are interested in capitalising on every marketing activity, and they tend to be very cautious in prioritising choices. Cities differ a lot with regard to the number of tourists that they attract; some of them being overcrowded and some are still in a race to attract more visitors. This hugely influences marketing activities. Cities that are looking to attract more tourists focus on visibility, accessibility and infrastructure, while cities that have a sufficient number of tourists that their existing infrastructure is able to support, focus on selling products for higher prices and more profit. This influences their marketing decisions and the approach they might adopt while examining various options for city promotion.

Being partially sponsored by public money, CTOs also rely on partnerships with service providers, operating as agents for their offers. This also influences the decisions of marketers; for example, the city tourism board, interested in selling more tickets for major sports events, is not likely to promote cultural tourism as the main tourism attraction.

Key activities

Operating within the city, CTOs together with tourist information centres are important for the tourism industry, as they engage in a variety of activities. The key activities CTOs are involved in are as follows:

- Enhancing all operations to promote the city brand: integrating activities to strengthen the brand of the city;
- Marketing the city as an attractive destination for travellers: working on the promotion of the city brand for both domestic and inbound visitors;
- Providing information for tourists directly or through tourism information centres: engaging on a daily basis with information for city visitors, either directly through established offices, or via different channels such as social media, website, phone, etc;
- Selling services for tourists: guided tours, attractions, hotels, city cards, etc;
- Promoting events in the city and/or organising events independently, or in partnership with other institutions;
- Facilitating and promoting Meetings, Incentives, Conferences and Exhibitions (MICE) industry;
- Promoting quality improvements the tourism facilitates: working together with organisations and different stakeholders towards establishing better quality services, such as accommodation, catering, leisure, etc.
- Engaging in various promotional activities within city marketing plans:
Organising B2B events, such as workshops and product presentation;
Organising press trips for journalists;

Operating tourist information centres;
Selling souvenirs.

MICE is a big part of the CTO's activities, as this is a very profitable segment of the tourism industry and an important channel for tourism promotion. Via MICE, business travellers coming in on business trips extend their stay for leisure, or business travellers that are likely to come back to the destination for holidays in the future with friends or family can also be targeted.

One of the functions of this is to provide information and facilitate travellers' stays. The CTO creates information distribution channels, such as mobile apps or websites, that require, and are populated with, interesting content. They also assist with other promotional activities that require quality content, such as brochure printing and participating in travel trade shows.

Opportunities for Europeana

Cities in Europe are proud of their cultural heritage, as culture historically has been a central element of urban development. It can be challenging to demonstrate the exclusivity of one particular destination in today's information rich environment. Thus, Europeana's offering of a vast digitalised cultural resources metabase might be a valuable solution in finding the individuality of a particular city. As CTOs' main concerns are the ability to attract more visitors or to increase the value of tourist spending, offering uniqueness from competitor destinations is crucial.

Every CTO is concerned greatly with tourism experiences in the city, and cultural tourism products are often created in partnership with local cultural institutions. Europeana provides more possibilities for city marketers to be inspired, as well as increasing the possibility of uncovering the cultural heritage of destinations. For city marketers, the idea of using culture as an experienced based layer that can add value to the city's offering is a high priority.

However, in many cases, a city will work in close collaboration with the local government as well as local cultural institutions. Being responsible for marketing cultural content and cultural activities to an international audience, the city's marketing team need to be selective in what they share taking into consideration its relevance, availability of information in multiple languages in order to efficiently promote it to international target markets.

Further to that, with dedicated funding provided to focus on annual themes, a city tourism board needs to think strategically when collaborating with the local cultural sector or organisations such as Europeana. Campaigns and annual themes are strategically planned two years ahead of their actual delivery. This provides them with sufficient time to meet with tour operators and organisations interested in booking trips to the city. Interesting themes and a compelling tourism offer can help a city to stand out get the buy in from tour operators from their international target markets.

For city tourism boards, being responsible for actively attracting visitors to the city and bookings for its stakeholders, any help that can alleviate some of the pressure of creating a compelling tourism offering can make Europeana interesting for them.

Chapter 4.3 Selling travel: Intermediaries between customers and suppliers

Chapter 4.3.1 A brief history of travel sales

Travel businesses that sell to end users have changed a lot during the last few decades. In particular, there has been a huge shift from traditional selling, when everyone in the travel

industry had a clear and straightforward role: tour operators tailored the trip, while agents sold them, airlines operated the transport, and hotels were in charge of the reservation of accommodation. A lot has changed since 1841, when Thomas Cook, a Baptist preacher, struck a deal with Midland Railway to organise the transportation of 540 members of his temperance society. The railway offered a train ticket and lunch for the cost of 1 shilling and while selling these packaged tickets, Cook received a commission from the railway.

The development of air transport infrastructure at the beginning of the 20th century and the post-war demand for travel made it necessary to seek technological solutions to manage booking procedures. As this spread and was introduced widely, the demand for travel agents also increased, with the desire for these organisations to have access to the complicated booking systems.

Expanding airlines increased the demand for increasing numbers of travel agents, and this network of agents became the bestselling channels for airlines. The automatised reservation systems for hotels have been developed alongside this technology, and this led to an increase of travel sales. The creation of automatised systems for bookings was still complicated, and created a need for more travel agents to deal with it.

As the biggest travel brands of the time were developing their websites in the early 1990's, Viator Systems created a system to book tours and excursions online in 1995, becoming the first online booking engine in travel. That led to rapid development of full package booking online solutions by Expedia, with Travelocity soon following their lead. Booking online developed alongside the promulgation and cultural prominence of the Internet, making it feasible to put more information in front of travellers prior to booking. The growing amount of information presented to travellers further developed via review sites and price comparison sites. And then the mobile revolution and the start of the sharing economy further influenced consumers by providing more information than ever, thus altering the landscape of travel indelibly.

Chapter 4.3.2 Operating mechanism

Tour operators, as well as online travel agents, are organising, performing and selling the final product of package holidays or separate travel services to tourists. Being the easiest and the most reliable form of travel, this has achieved a big market share. The guaranteed legal protection provided by legislation and support throughout the trip that is implicated by law accounts for the popularity of this form of travel.

There are different ways that tour operators are able to tailor trips and induce more and more people to engage in these activities as new forms of performance arise. One of the most conventional operational forms is pre-arranged packages. These are ready-made holidays from a tour operator made up of at least two elements: transport, accommodation, or other services, e.g. car rental. Technological changes caused the evolution of the industry for the consumer, who is able to get more information without leaving the house.

There are different services available online; consumers can now acquire more details via live consultation, compare prices and value, and even have the opportunity to tailor packages for themselves. This provides the customer not only with the possibility of evaluating the options in front of them accessible from home, but also with the potential to purchase more customised packages.

The services are a selection of components provided by the traveller and bought from a single business either online or offline. This is developing further still, with linked travel arrangements for consumers becoming more popular. Having booked one travel service on one website, the customer is then invited to book another service through a targeted link or similar.

Chapter 4.3.3 Tour operator or travel agent

The main difference between tour operators and online travel agents is that tour operators are responsible for operating and providing package vacations through contracting, booking and packaging together various components of the tour such as the hotel, transportation, meals, guides, optional tours and sometimes flights. Many tour operators are considered land-only operators, and focus on the aspects of your package once you have arrived at your destination, while some own their own airlines that actually operate the flights.

Travel agents are selling and administering packages from various tour operators to their personal clients based on what they require and what package suits each individual client best. While many tour operators focus on a selected concentration of destinations, most travel agents specialise in a range of destinations, with the ability to narrow down a package for that specific destination or area based on the budget, preferred method of travel and interests also available to them. Travel agents will then work directly with tour operators to perfect requests and provide tour operators with the requisite information and payments.

Chapter 4.3.4 Travel retail from a consumer's view

With the increase of Internet use in everyday life, the independent booking of tour packages directly from tour operators is now more readily available than it has been in the past. Therefore, the need for an agent to know what operators are out there and available has been reduced significantly. Most tour operators deal directly with clients and sell their own packages removing the middle man, however many people still prefer to use their local or family travel agent that they have known for many years.

There is no significant difference for the consumer today between tour operators selling conventional methods of accessing travel and online travel agencies, apart from the fact that OTA does not necessarily have a physical office to provide such services. Different pieces of legislation are making package holidays safer than ever. However, it is more difficult for businesses to operate, owing to the higher standards demanded by consumers, and this means more expense in a world in which comparison of prices is a business itself and choices are hugely influenced by price; these are indeed great challenges.

One of the ways travel retailers are addressing these challenges, is by providing better customer experiences as part of the actual journey; a unique niche that caters for special tastes and which is able to offer something exclusive with easier methods for planning and booking. The content that stands out and triggers the consumer to buy is a very important thing for OTAs in particular.

Chapter 4.3.5 Airlines

Airlines were historically a big part of selling travel to tourists through their own or outsourced travel agents, via developed reservation systems. That has changed significantly, as a result of rising numbers of passengers as well as technological change, which enabled individual travellers to buy tickets directly. This has also created a possibility for more individuals to establish small businesses. Cheap airlines revolutionised the travel industry and also contributed to the ability to sell tickets directly to customers. As a consequence of this, there was an increasing focus on a very specific business model with unrestricted and low fares, operating on high-frequency, relatively short routes. Additionally, simplifying the sales procedure became a priority, ensuring that no physical tickets were printed, while using secondary airports and increasing the productivity of staff enabled costs to be reduced significantly, which changed airlines permanently. The travel industry has grown dramatically during the last few decades, and the economy of scale led to further price reduction as the numbers of people travelling across borders every year increased.

There are different potential marketing schemes within airlines and this enables them to be platforms for advertising. Contemporary airlines also have the possibility to promote various aspects of their operations through their websites, which are visited by their target audience; mostly people with intention of traveling. Airlines can also run promotions through different media channels, such as inflight magazines or inflight TV, that have the potential to promote destinations or different services within them.

Although the potential for airlines to distribute cultural content might be an important platform, it is less likely to pick up on very niche and unique aspects of the travel industry, such as Europeana's offering, as the main concern and target for them is selling more tickets or getting the advertising money from the media platforms they already operate. And it is quite complicated to see whether there are any options for rich cultural content, that can be utilised with the intention of creating unique selling points.

Opportunities for Europeana to reach out to the industry through airlines are quite limited, as most of the communication is dedicated for the promotion of products for end-user travellers. There are more efficient ways to communicate with the tourism industry, as Europeana currently is, it is more efficiently communicated via B2B.

Chapter 4.3.6 Arrival Guides

Arrival guides were an essential source of information before the era of social media, they were sort of printed versions of TripAdvisor that provided an accurate insight from travellers' experiences in various destinations. This was a successful business model, generating revenue by selling books on different destinations and often being the main source of information that claimed to share a neutral point of view. Some of the brand associated with this cultural phenomenon becomes pretty successful, such as Lonely Planet, Rough Guides, Marco Polo Guides, etc.

The great revolution in technology that has taken place in recent years has changed demand for published independent guide books, and the publishers of arrival guides had to change also. Predictable, not all of the companies that produced such guides were able to keep up with the pace of change. The massive amount of information circulating online, with word-of-mouth being available through the form of social media and review sites, has had a massive impact on the arrival guides industry.

Well-established guides such as Lonely Planet adapted to this change more successfully, making their content available through different media channels and moving towards the booking site industry. Lonely Planet was able to exploit the advantages that well-known brands have, and partnered up with service providers to enable consumers to book trips through the integration of various booking platforms on its website.

Arrival guides are still branding themselves as the most reliable source of information, but now being able to provide complementary services to tourists, by partnering with service provider, means that travel guide websites are becoming one-stop shops that are rather similar to OTAs.

Chapter 4.3.7 Europeana Potential

The variety of topics that are covered by travel guides are not limited to destinations these days. A lot of content is focused on specific themes and sales rely on information that is unique in one way or another. Culture is an important aspect of selling European destinations, and cultural heritage is the main motivation to travel to Europe. With this in mind, the possibility of having access to an extensive meta-base available for reuse could be a very valuable asset from the perspective of one of the publishers, if presented to the appropriate people within the companies, offering inspiration and creative potential.

The other successful development that printed arrival guides have decided to implement, in order to be concordant with technological developments, is the production of offline apps with information, that manage to succeed in competing in the marketplace with the other providers. The availability of diverse and credible sources of information, such as Europeana, could provide a new opportunity for travel guides to potentially develop new apps that may vary in content. Approaching travel publishers with Europeana should also be focused on the ability to sell more books, or increase the sales of other travel products promoted via the sites.

Chapter 4.4 The Importance of Culture in Tourism

Chapter 4.4.1 Cultural Tourism

The European Union recognises the importance of culture as an integral part of the European tourism experience. Undoubtedly, culture is a crucial component of any tourism destination and experience across Europe due to the common cultural heritage. The European Commission and UNWTO actively support the development of cultural tourism leading to growth and an improved cultural offering for visitors. Besides maintaining growth in tourism, these global and regional organisations are also making it a priority to preserve the cultural heritage focusing on places, artefacts and sites. This is a major responsibility when encouraging growth in these interlinked sectors, leading to a more sustainable development of culture and tourism.

In the area of cultural tourism, there are some actions that the European Commission and a range of policy-making and advocacy organisations have supported and brought about. The European Commission and other bodies are regularly funding cultural tourism projects, primarily aimed at the development of transnational tourism products that are based on cultural heritage and can provide support to SMEs starting in tourism.

In countries where tourism and the development of tourism demand and products can create a genuine benefit for SMEs, and lead to economic and socio-economic benefits in rural areas in Europe this is particularly the case. The European Commission is actively cooperating with the Council of Europe, the European Travel Commission, United Nations Tourism Organisation and other partners to contribute to the development of cultural tourism.

The European Cultural Routes are one of these actions that the European Commission and the Council of Europe are supporting. These transnational routes help tourists discover how Europeans have lived since ancient times. In 2010, the Council of Europe adopted the enlarged partial agreement on cultural routes aiming to reinforce the potential of cultural routes for cultural co-operation, sustainable territorial development and social cohesion, with a particular focus on themes of symbolic importance for European unity, history, culture and values and the discovery of less well-known destinations. This strengthens the cultural exchange and tourism development through the provision of more diverse and alternative itineraries and tourism products.

The enlarged partial agreement between the European Commission and the Council of Europe is an example of cooperation between leading regional organisations to educate the consumer and wider industry about culture and the potential of culture in a tourism context. 33 cultural routes in Europe are certified by the European Institute of Cultural Routes based in Luxembourg. Each of these transnational routes has very different themes that illustrate European memory, history and heritage, contributing to an interpretation of the diversity of present-day Europe.

The 33 European Cultural Routes are:

The Santiago de Compostela Pilgrim Routes (1987), The Hansa (1991), The Heinrich Schickhardt Route (1992), The Viking Routes (1993), The Via Francigena (1994), The Vauban and Wenzel Routes (1995), The Routes of El legado of andalusí (1997), European Mozart Ways

(2002), The Phoenicians' Route (2003), The Pyrenean Iron Route (2004), The European Route of Jewish Heritage (2004), The Saint Martin of Tours Route (2005), The Cluniac Sites in Europe (2005), The Routes of the Olive Tree (2005), The Via Regia (2005), Transromanica - The Romanesque Routes of European Heritage (2007), The Iter Vitis Route (2009), The European Route of Cistercian abbeys (2010), The European Cemeteries Route (2010), Prehistoric Rock Art Trails (2010), European Route of Historical Thermal Towns (2010), The Route of Saint Olav Ways (2010), The Casadean Sites (2012), The European Route of Ceramics (2012), The European Route of Megalithic Culture (2013), The Huguenot and Waldensian trail (2013), Atrium, on the architecture of totalitarian regimes of the 20th century (2014), The Réseau Art Nouveau Network (2014), Via Habsburg (2014), The Roman Emperors and Danube Wine Route (2015), The European Routes of Emperor Charles V (2015), Destination Napoleon (2015), In the Footsteps of Robert Louis Stevenson (2015)

Each year, the Crossroads of Europe event promotes European cultural itineraries and raises awareness about their potential for tourism among stakeholders, businesses, destination managers, national and local authorities. The last editions took place in Ferrol, Spain (2014), Toulouse, France (2013) and Pavia, Italy (2012).

The Cultural Routes focus on intercultural dialogue and the diversity of European heritage. Although each route is transnational, the NGOs behind each Route aim to collaborate as much as possible with different sectors and stakeholders to maximise the benefits of promoting the European Cultural Routes. The European Institute of Cultural Routes is working closely with the European Commission and the European Travel Commission. In 2015, the European Travel Commission together with the European Institute of Cultural Routes organised a blogtrip, for well-known bloggers to experience the European Cultural Routes first hand.

Chapter 4.4.2 Tourism Development

Culture and tourism are two sectors closely connected due to their nature but are currently not working together and tapping into the full potential of working in a more collaborative manner. UNWTO is the organisation working closely with culture and tourism mainly at a policy level. For many years, UNWTO and UNESCO have worked on raising awareness about the strong interlinks between culture and tourism, stressing the need for mutually beneficial partnership models.

In February 2015, UNWTO and UNESCO organised its first World Conference on Tourism and Culture, which took place in Cambodia. For the first time, UNWTO and UNESCO brought together over 40 ministers of tourism and culture with the objective to identify key opportunities and challenges for a stronger cooperation between the sectors and also on a policy level. In 2014, the World Heritage List reached 1,000 sites for the first time and international tourist arrivals reached over 1.1 billion, showing the unprecedented development of cultural tourism. This growth has been beneficial for many tourism destinations, but also comes with an increased responsibility, especially with regards to ensuring a sustainable approach to tourism development as well as heritage management.

The outcomes of this initial conference looked at the collaboration between tourism and culture leaders. Tourism and culture need to be equal partners, with the tourism industry needing to understand that culture and cultural heritage is an important asset for tourism and destinations, which needs to be managed appropriately. Partnerships can be a unique opportunity to help organisations drive cultural tourism forward. The conference also highlighted the combined needs of the cultural and tourism sector and highlighted the following points:

- To have a combined ministry of culture and tourism in order to ensure the effective cooperation within a shared ministry of tourism and culture

- Tourism is everybody's business, so is culture, making it necessary to work together and be supported by the highest level of government remaining high on the national agenda
- Securing the highest level of support within the government for cooperative and coordinated outcomes
- Tourism and culture need to be considered a long-term issue especially with regards to achieving sustainability
- Support the effective cooperation between ministries to support the economic and social sustainability of the nation

Chapter 4.4.3 Opportunities for Culture in Tourism

There are clear synergies between tourism and culture, but often their government and administrative structures are disconnected and not sufficiently coordinated. This leads to poor outcomes for national and regional development, planning and management of culture and tourism. New models need introducing, building strong, fundamental links between tourism and cultural heritage.

As part of the World Conference on Tourism and Culture, Mr. Taleb Rifai, Secretary-General from UNWTO, shared three ways in which tourism and culture can work together to build a better future:

Tourism and culture can work together for economic growth:

UNWTO stresses the need for a responsible use of cultural assets for tourism, creating new employment opportunities and income for local communities. Famous cultural and heritage sites are attracting visitors with often the local communities are not being able to yet fully benefiting from that.

Tourism and culture can work together for social development and stability:

"Tourism breaks down walls and builds bridges between visitors and hosts". People travelling have respect and an understanding of culture, having experienced it first hand.

Tourism and culture can work for heritage protection and preservation:

Tourism and culture need to find a healthy balance between increasing visitor numbers and the preservation of cultural heritage. Culture and tourism need to work together, finding innovative approaches and the better use of opportunities offered by technology.

It is necessary to encourage culture in tourism as a living heritage, providing the basis for contemporary society. Cultural tourism now is the largest market segment in motivating travel choices. The tourism and cultural ministry level see a clear need to develop new models of participation to ensure creativity within stakeholder communities.

There is an explicit recognition that culture and tourism need to work more closely together. The advocacy work carried out by UNWTO, UNESCO and the European Commission have laid the foundation for cooperation. Now there is the opportunity for Europeana to build on top of the existing awareness of the importance of culture and tourism to support further development.

Cultural and tourism are sectors that now have greater financial support available, especially in view of actively stimulating growth, benefiting SMEs, leading to innovation in the sectors. This is positive for the Europeana, as culture and tourism are receiving a boost that can lead to real progress and the active development of tourism products and services, having culture closely intertwined in the offering.

Tourism is still considered a cottage industry, meaning it is an industry that is in many places informally organised and mainly produces products and services that are unique and distinctive, not mass produced. In Europe, technology is booming in many parts, with tourism increasing in consumer demand. The overall heightened demand for technology and innovation is a positive development for Europeana and its venture into tourism.

Chapter 4.4.4 Mini Case Study UNWTO

International tourism is actively contributing to over 10% of global GDP and one in every eleven jobs. At UNWTO, a lot of work is carried out towards making this impact even greater. By 2030, UNWTO forecasts the number of travellers to reach 1.8 billion. UNWTO is working on sustainable tourism development and has ventured into niche sectors in tourism. In the following, the different activities of UNWTO are outlined and analysed to draw some conclusions based on using UNWTO as a case study in the cultural tourism field. The approaches and concepts shared as part of the mini case study will help Europeana to identify learnings and the findings were included in the strategic and tactical action plan.

Over the last years, UNWTO have made significant progress in the field of cultural routes, mainly through its declaration of silk road tourism. As part of this declaration, 19 countries have committed to promote the cultural routes as one of the world's richest and diverse cultural tourism destinations. Building on the unique cultural heritage in various countries, UNWTO is working in close collaboration with local communities in order to enhance the development of unique visitor experiences. The Silk Road is bridging the ancient civilisation of the east and west.

Through the creation of cultural itineraries as part of a destination's tourism offering, a destination can build a strong alliance between tourism and culture towards a sustainable development. Creating a unique cultural offer means becoming a major driver and motivating factor for visitors travelling to a place. In tourism, cultural routes an excellent opportunity to create a tourism product based on experiences, spreading benefits to multiple players throughout the tourism value chain and its linked sectors.

UNWTO highlight the fact that culture and tourism must be mutually supportive of each other to make the relationship sustainable. Both the public and private sector need to work together, providing better services and enhance a visitor's experience. UNWTO continuously strive to raise awareness internationally on the growing importance of cultural tourism. Conferences organised focusing on cultural routes have stressed the direct link between tourism and the historic and cultural legacy of cultural themes and routes. UNWTO recognises that new initiatives are needed to create an international network of organisations and professionals that exchange their experiences in research, training of professionals, promotion, marketing and tourism and cultural management.

Cultural route tourism combines tangible and intangible cultural resources, leading to a more attractive and exciting tourism experience. As part of UNWTO's World Conference on Tourism and Culture, the delegates discussed how cultural routes can offer important opportunities for tourism development. For UNWTO, cultural routes enable the tourism industry to:

- Link people
- Foster sustainable development
- Showcase different aspects of promoting intangible heritage and cultural itineraries
- Raise awareness of a common cultural heritage
- Overcome seasonality by attracting year round demand
- Address new market trends emerging in tourism to offer enriching experiences
- More flexibility, discovery, learning and contact with local people and traditions

UNWTO are actively encouraging public-private partnerships (PPP) in tourism in order to enhance tourism development and competitiveness of tourism destinations by facilitating innovation. PPPs can bring together stakeholders with different objectives, skills and resources, improving the attractiveness and competitiveness of destinations. In tourism, PPPs are vital elements of initiatives, often leading to fruitful collaborations among different stakeholders and organisations.

The most common objectives for PPPs in tourism are:

- Business competitiveness
- Economic sustainability
- Capacity building
- Environmental conservation

Successful public and private partnerships lead to mutually beneficial outcomes for all stakeholders involved. UNWTO is particularly stressing the importance of being able to demonstrate a tangible result of a PPP, ensuring momentum. Often one organisation cannot achieve its desired goals individually but through collaborating, it is possible for organisations to achieve jointly set goals. For UNWTO it is important to work with its members on sustainable tourism projects and PPP where there are benefits for all partners involved.

Key conclusions for Europeana

The Europeana should closely collaborate with UNWTO on a range of activities as part of their Affiliate Member Programme. Being included in activities, spreading awareness of the Code of Ethics for Tourism, providing articles for UNWTO publications and contributing information as a thought leader and unbiased organisation in culture and tourism. The Europeana should cooperate with UNWTO to promote cultural tourism, raising awareness about good practices and innovative business models being implemented by tourism organisations.

Further to that, UNWTO is also encouraging international and national initiatives that draw together historic and thematic areas into tourism. Due to complexities of cultural tourism, UNWTO is stressing the need for knowledge exchange and also re-thinking current approaches and models. Cultural tourism requires organisations to think from a visitor perspective when developing tourism products. For Europeana this can be an excellent opportunity to build a bridge between culture and tourism, providing ideas into the development of new and exciting themes and topics in cultural tourism.

UNWTO's major challenge is the fact they as an organisation, it cannot implement initiatives or projects themselves to create something new and exciting. The Europeana can, therefore, take a lead and be ready to support and help the implementation of cultural tourism.

Chapter 5 Industry Consultation

Chapter 5.1 Consultation Reach in the Tourism Industry

Chapter 5.1.1 Choice of consulted industry players

The industry consultation aimed to establish the current level of awareness of the Europeana database and content, identifying the potential for its distribution in tourism and partnerships. The choice of consulted industry players was therefore carefully selected, covering each segment of the tourism industry to be able to draw clear recommendations based on the consultation findings. Initially, it was planned to conduct 10-15 individual interviews, being realistic about the available timeframe for the industry consultation. However, due to the team reaching out to key industry players at an early stage, a total of 17 individual consultations were carried out.

Industry consultation was chosen as a method to gather sufficient insights into the current distribution potential in tourism. Being able to involve selected tourism professionals from leading tourism organisations was essential to understand their needs, being involved in the day to day work of reaching out and attracting visitors to various European countries and destinations. Each tourism organisation consulted was able to share suggestions based on their unique perspective and experience in tourism and culture. A focus group further backed up the conclusions drawn from the consultation process and verified some of the recommendations included in the tactical and strategic action plan.

Input spectrum

Input from a wide range of carefully selected tourism sectors was sought to develop successfully an appropriate framework and to identify clearly the criteria and actions for the further development of Europeana in tourism. Consulting organisations from within the tourism industry across the whole of Europe helped to identify different aspects to consider for Europeana, especially the cultural heritage relationship with tourism and the needs for a distribution plan for the Europeana.

Every interview was selected from the previously defined interest groups and most of the interviewees were decision makers or directly involved in tourism promotion. These individuals are involved in the tourism promotion through traditional and digital channels as well as seeking new opportunities through trends or new content opportunities. With teams in tourism often being quite small due to limited budgets, there is an overall need to innovate in tourism to overcome the boundaries of tourism organisations through the use of digital tools and technologies as well as tapping into content opportunities in order to meet the needs of the consumer.

Business criteria

As outlined in the tourism industry mapping, tourism is a diverse industry, having multiple sectors and organisations to consider. Selecting representatives of global organisations, umbrella organisations, national and city tourism boards and some of the private entities meant ensuring a clear focus on establishing the prioritisation of cultural tourism as the part of their offering. Further to that, SE1 Media only considered the most significant players, providing a good sense of direction for Europeana to understand the entire tourism industry.

Geographical criteria

To ensure the industry consultation was not only conclusive but based on the wide coverage of players in the industry, the consultation was spread across the whole of Europe. Global, Regional and national organisations that were most relevant as part of Europeana's distribution in tourism

were chosen. With the help of the individual consultations, the Europeana can identify the key connectors within tourism, helping to link culture and tourism further.

Strategic criteria

Global organisations:

Global organisations were consulted due to their focus on policy making and advocacy. Their primary focus is on relationship building, liaising with a range of partners to drive forward culture and tourism as an integral part of the global, regional and governmental agendas.

Regional promotion and policy makers:

Regional organisations are directly influencing the direction for regional promotion in tourism and culture as well as driving policy recommendations and overall activities forward among their members.

National tourism promotion, branding and marketing organisations:

Focused on the promotion of national tourism and culture, national tourism organisations follow a strategic approach towards branding and marketing of the individual country's tourism and cultural offering. These organisations are potential users of Europeana content.

Selling travel:

Organisations that are directly selling travel to end consumers are interesting to consult in view of identifying opportunities for Europeana in tourism and how Europeana's offering could be adapted to the intermediary and travel supplier sector.

Chapter 5.1.2 Reasons for declining the consultation

The initial consultation scope of 10-15 consultations was exceeded, but not all of the tourism organisations contacted for the consultation process were keen on sharing their views and exploring Europeana's potential in tourism. A total of 7 umbrella organisations, 16 National Tourism Boards, 11 City Tourism Boards, 9 OTAs and 6 Leaders in Digital were contacted. Overall 49 requests were sent, resulting in 17 interviews. With any industry consultation, it is expected that only a representation of organisations that were contacted are taking part in the process.

For those declining to be part in the consultation process, the following reasons were stated:

- Cultural tourism was considered too granular for the scope of their work and activities
- The content Europeana accumulates is too academic
- The database is not inspiring enough
- There is no potential to attract more audiences
- There is no potential to increase sales
- The technical side of things is not simply adaptable for the company needs
- Culture is too small of a niche to focus on

The global organisation WTTC also declined to be part of the consultation, as their focus lies in more general areas and global issues, while cultural tourism is a small niche. The organisation is, therefore, not able to share their expertise on a narrow topic, as it does not have an expert in the field. Europeana as a cultural product will only be relevant for relevant sectors within the tourism industry. Organisations have to justify activities based on achieving their overall goals, meaning it is difficult to establish the value of Europeana distributing content at the time of the consultation.

Interview structure

Every consultation was carried out with the particular organisation in mind, either their activities relate to culture or the importance of culture is the key product offer. The primary goal was to identify the general awareness of Europeana, the possibilities for reuse or identify the barriers

preventing it, the trends that are prevailing in particular industry sectors and ways forward to make a difference for Europeana within tourism. The questions were designed to clarify these points, identifying opportunities to establish clear recommendations for Europeana.

Familiarisation with Europeana and its resources

Exploring the current level of awareness amongst different sectors of the tourism industry was necessary to be able to draw concrete recommendations for the Europeana to follow as part of implementing strategic and tactical actions.

Viability of the content offering

This group of the questions primarily focused on a strategic angle, to understand whether Europeana resources are considered relevant enough for the tourism business to be useful within the remit of the organisation consulted.

Content distribution

The current status of content distribution within the company is critical seeking to position the Europeana content ad part of a well-established system. The questions focused on the current content distribution and overall business models.

Trend awareness

Identifying cultural tourism trends can help to understand how Europeana's approach might need to be adapted and identify trend opportunities.

Strategic integration

These questions focus on understanding more about how cultural tourism fits within the strategy of the organisation in question.

Chapter 5.1.3 General remarks about the consultations

Before reading the individual consultations, it is important to mention that some of the interviews might reflect that there was no prior knowledge or interest in Europeana. In some cases, the Europeana was never considered as a relevant content partner, so the consultations often also served to discuss Europeana, brainstorming about the value of Europeana for tourism. Each consultation is highlighting specific challenges and opportunities from the perspective of the individual organisation, aiming to identify solutions and approaches for Europeana.

Although some of the consultations might not be considered as useful and relevant for the purpose of this plan, they are still included, as the consultation was conducted and there are still findings and results for the Europeana to consider.

This initial industry consultation is a good starting point for the Europeana to gain some much needed insights into the way in which tourism organisations work, their approaches, needs and expectations. Further to that, the consultations also highlight how the Europeana brand is perceived by tourism organisations and the challenges in communicating Europeana's offering and added value.

The tourism organisations consulted can be categorised into four different groups based on the outcomes of each individual consultation:

- **Added value for Members:** Organisations such as WYSE Travel Confederation, ETC, ECM and NMTU all expressed interest in the opportunities that Europeana could deliver for their destination and business members. For these organisations, Europeana is something that seems interesting for their members or client destinations to work with and use. There are clear opportunities to establish concrete pilot projects to start working with these umbrella organisations to get access to their member organisations and clients.

- **General support:** The European Commission as a body is an organisation recognising the current success of Europeana in culture and will continue its support and collaboration on a pan European level. For the Europeana, having this kind of support is absolutely critical for future projects.
- **Pilot destinations:** Some of the destinations consulted were selected on the basis that the cultural institutions within their countries are already actively working with the Europeana. Consulting these destinations helped to establish their needs concerning culture in tourism and some concrete recommendations were drawn for organising pilot projects with them. Vienna, Ljubljana, Lithuania, Estonia, Poland and Norway are all destinations where the Europeana could establish closer relationships, working with them to curate content that they can re-use as part of their upcoming campaigns and cultural tourism work.
- **Different perspective:** 7Scenes, Musement, ArtStack, Expedia, TripAdvisor and Tripomatic are all organisations that have provided different perspectives relevant for the consultation process. Organisations in this category are considered not of primary interest for future collaborations but conclusions drawn from their consultations still helped to shape the tactical and strategic implementation plan.

Chapter 5.2 Industry Consultations

The following industry consultations carried out as part of the research are all summarised as part of the addendum on pages 99 -135:

- WYSE Travel Confederation (p.99)
- European Commission (p.101)
- European Travel Commission (p.104)
- European Cities Marketing (p. 106)
- Polish National Tourism Organisation (p.108)
- Estonian National Tourism Organisation (p.110)
- Lithuanian National Tourism Organisation (p.112)
- Innovation Norway (p.114)
- Visit Ljubljana (p.115)
- Vienna Tourism Board (p.117)
- 7Scenes (p.120)
- The Artstack (p.122)
- Musement (p.125)
- Expedia (p.127)
- New Mind Tell Us (p.129)
- Tripomatic (p.131)
- TripAdvisor (p.134)

Chapter 5.3 Culture in Tourism Focus Group

As part of the focus group, a mix of tourism destinations and organisations were consulted. The aim of the focus group was to test and verify some areas the Europeana should focus on, which are outlined in more detail as part of the strategic and tactical action plan. The size of the focus

group was limited to a small group of individuals to be able to discuss ideas and concepts sufficiently and in detail within the timeframe available.

The Flemish Region of Belgium or Flanders was selected as a geographical area to carry out the focus group. The Flemish Cities Ghent, Leuven, Antwerp, Mechelen, Bruges and Brussels are working closely together in the cultural field as part of their collaboration as the Flemish Art Cities. Because of that, they are a suitable testing ground to explore common practices and challenges to incorporate culture more into an attractive and new tourism offering and tourism experience. Identifying what has already been done in the field and how Europeana could come into the culture and tourism mix can ensure that the Europeana can actively tap into opportunities.

In addition to verifying concepts and exploring topics more in detail with the destinations, the focus group also enabled the SE1 Media team to include an organisation from the tourism startup scene, focusing on pre-seed and seed startups in travel & hospitality tech, food and beverage tech. The travel startup scene is closely linked to tourism, often providing tourism products and solutions combining culture and tourism. Especially city tours and guides are often considered an attractive area for startups to develop a new technology solution, often in the form of an app or other solution that can be used by the visitor.

Chapter 5.3.1 Opportunities for culture as a tourism offer

Flanders as a region is unique both with regards to city collaboration and their international tourism marketing efforts. The following points outline the different areas the focus group highlighted, emphasising different thought processes, ideas and suggestions as to how the Europeana could add value to the Flemish Art Cities. Culture is certainly at the core of the Art Cities marketing efforts, focusing on enabling visitors to discover the unique culture that can be found in the cities. Due to the geographical location of Flanders, the individual cities are focusing their international marketing efforts on attracting visitors from neighbouring countries. As the Flemish Art Cities can easily be considered as similar, each city is trying to focus their marketing efforts on something that is unique to the specific city.

For Leuven, this is the cultural heritage and religious heritage that can be found in the city as well as its unique university buildings. For Ghent, the focus is on the unique altarpiece, highlighting the lifelines in the city through the many festivals as well as Ghent as a rich city, focusing on its gastronomy and food. Each year, the department of culture of each city also has an annual theme which is supported by a range of exhibitions throughout the year. For the city tourist board, this is however only relevant for their international marketing efforts when an exhibition has global potential and appeal. Once there is such an opportunity, the tourist board works on putting the city into the international spotlight.

Often it is either the department of culture or a dedicated organisation that is in charge of organising cultural exhibitions in the city and planning festivals and a multidisciplinary programme of lectures, theatre and music that can support these exhibitions. There is a clear divide between promoting these cultural activities and themes locally and the city tourist board promoting only a select number of cultural themes to an international audience, in the individual language of the market.

There are some issues that arise when promoting cultural themes within a city. To promote a cultural theme to neighbouring markets, it is important to have sufficient information in a selection of foreign languages, often German, Dutch, Italian and Spanish. Languages are particularly important, as once a visitor is arriving to a city to explore its culture, museums or exhibitions, they need to have information in the visitor's language. Only then they can really experience and understand the cultural link between the city and cultural theme. Often there is insufficient content available or it might not be ready to be used directly for tourism promotions.

Timeframes are another major challenge for tourist boards working with the cultural sector. Content on a cultural theme needs to be ready two years in advance of its delivery. Timing is particularly important, as tourist boards are visiting travel trade shows to meet the international press and tour operators, aiming to get the cultural theme and city promoted to different target audiences. However, if the content is not ready in time, it becomes impossible to be able to market it sufficiently in advance to an international audience. Many cultural departments are working too slow making the collaboration with the tourism department inefficient. Often information is being provided without taking into consideration the longer timeframe needed to be able to include it into any promotional material.

The city tourist board is often working with a long-term focus and strategy, especially when marketing to an international audience. It is sometimes a real challenge to establish a city in a new or neighbouring market and it can take a significant amount of time, dedication, meetings and convincing for the city's promotion to lead to a gradual return. There is often a disconnect between the cultural and tourism sector to understand it takes a very strategic and long-term focus in tourism to be able to attract visitors from certain markets. Once visitors are travelling to a city, the experience in the city also has to hold up to their expectations. For many cultural institutions, this also means working with a long-term focus on delivering a great experience to a range of international visitors.

Chapter 5.3.2 Culture and tourism collaborations

In a city tourism context, culture and tourism are collaborating closely, as both the department of tourism and culture are part of the same city government. The cultural department is providing suggestions of annual themes and sharing a calendar of cultural events and activities with the tourism department. It is then up to the tourist board to decide which cultural themes, events and activities are the most prominent and appealing for targeting their selected international markets. However, there are also challenges arising with this process, such as the high level of bureaucracy involved in the selection of cultural themes.

Both the cultural and tourism sector need to work together on understanding both the specific needs with regards to timeframes and specific content needs for the tourism industry. The Flemish Art Cities often find it particularly difficult to turn content provided by the cultural sector into something that is appealing to tourism. Cultural institutions often use a 'high-brow' culture language to describe cultural themes, lacking compelling images or tourism relevant content. Making the content more relevant for visitors and based on creating a unique visitor experience is often a challenge and involves significant time. There is a continued struggle to ensure visitors are enthusiastic about the city's cultural offering and destination.

It also is important to convince the cultural sector of the importance of tourism and the continued appreciation of culture in the city. Leuven as an example is aiming to improve its current cultural potential by increasing the amount of online promotions focused on cultural tourism products, continuing to work closely with their cultural sector. The present relationship between culture and tourism is sometimes quite challenging, requiring continued work on involving the cultural sector and keeping the right strategic focus in all tourism promotions of the city.

Both Leuven and Ghent are facing challenges when trying to get the buy-in from the cultural sector and need to communicate the added value tourism can bring to culture. Cultural institutions and departments are often hesitant to see how their relationship can be mutually beneficial - tourism as a sector is still considered as 'vulgar', reducing the value of culture. Tourism products that are based on cultural themes are often considered as not being representative of culture or 'real' culture. For city tourist boards, it is essential to have regular meetings, explaining and justifying why cultural themes are marketed in a certain way as part of the city's tourism promotions.

Interestingly, many of the cities have an enormous amount of cultural information and content available for tourism promotions. Their cultural partners are often eager to provide content to be used but city tourist boards often struggle to be able to identify what content is genuinely unique and identify key opportunities for all cultural content available. Currently, the cultural sector finds it difficult to make an unbiased recommendation for the tourism industry, leaving the city tourist boards often overwhelmed with cultural content. Due to limited resources and funds, city tourist boards need to make strategic decisions and be selective with regards to which cultural themes are taken up and promoted to an international audience.

Looking at the material that cultural institutions share and identify what is usable for the international promotion. The city tourist board also has to check the current state of cultural content with regards to its readiness to be used for tourism promotions. As a marketer and advocate of the city, cultural content needs to be filtered gradually, identifying where there are real opportunities to promote cultural themes. In addition to that, there are also national themes that are chosen by Visit Flanders, leading to even more themes for the cities to explore, develop and promote. For any city tourist board, it is crucial to ensure that none of the tourism products that are marketed are artificial. Making a theme their own, showcasing it in a unique way can be quite difficult.

Being able to receive content in time is another major hindrance to establishing collaborations between culture and tourism. Cultural themes and products with a great international potential need to be communicated to tourism organisations and the press in selected markets well in advance of their delivery. Developing the cultural product further means creating dedicated tourism products such as walks, tours or guides, which is taking time but can help to enhance a visitor's experience when in the city. Where available, it is also important for the city tourist board to invest budgets into press and marketing efforts to boost the promotion of particular cultural themes.

Another important factor for city tourist boards to consider, are promotional funds that are available for culture. Often there are limited funds available in a city to promote select thematic products, which can be used towards organising a competition together with transport providers. For a city tourist board, it is crucial to use these culture funds to drive forward cultural tourism promotion to national and primarily international visitors. However, the majority of promotional work of cultural themes is based entirely on these financial subsidies.

Besides cultural institutions, there are also organisations in the cultural sector, which develop databases specifically for the tourism industry to use. These can contain information relating to events, cultural exhibitions and dates which the DMOs use and include into their events pages on their destination websites. cultuurnet.be is one example for such a database and is considered to be the most significant culture content provider for the Flemish cities. Many of the Flemish cities are only translating the entries provided by their database and are including them into their website. Competition in providing cultural information is high, as there are also plenty of other platforms showcasing the best content in areas such as food, art, film, literature and travel free of charge. Of course this is not at all in competition to Europeana's offering. However, it demonstrates just how much information is available and what tourist boards could use.

Chapter 5.3.3 Collaborations between Art Cities

At the moment, each of the Flemish Art Cities are promoting their cultural offering individually through their social media channels. Flanders, the national tourism board, representing all of Flanders is looking to identify relevant topics and activities for each year, promoting it to relevant markets. Although there are regular meetings among all six Art Cities, where they aim to create a schedule of activities of what each city is doing, there are no joint marketing activities or

collaboration. As budgets are small, there is an increased need to collaborate but all cities are still competing for visitors, making this a difficult task.

Although there are clear geographic links between the Flemish Art Cities, there have not been any collaborations with transport providers, even though there are often direct Eurostar and Thalys connections linking them with the major international markets. The Art Cities are trying to put forward a strong cultural offering to attract international visitors, however, are currently not working much in collaboration. Europeana can get the Flemish Art Cities together with transport providers to discuss opportunities for using Europeana content that is unique and fresh in a collaborative way, promoting the cities in an intense and exciting way to international markets. It is in all parties interest to ensure that the Flemish cities have a compelling offering, which can drive cultural tourism forward.

Another interesting area for Europeana to explore further is the fact that the Flemish Art Cities are sharing a common database, a content management system, containing information relating to the cultural offering within the cities. Developed in collaboration, a lot of work has gone into establishing the database into something highly useful and valuable for the cities to tap into on a regular basis. The database includes tourism products, city highlights and text that can be used by tourism marketers in the cities. The content is divided into goals such as online copy, print copy, short or long text, thinking strategically about the way in which the database will be used by the different cities and what will be searched, making it a quite practical database to use.

A lot of work is going into adapting the content to different ways of using the content, such as print, copy or website. One dedicated person per city is responsible for feeding in the content and to collaborate also with copywriters in order to adapt content to different markets and languages. Currently, the database is mainly focused on text and the cities have a separate image database. However, there is potential to add content focused on specific themes and Europeana as a content provider could come in and help to identify further valuable content to include.

Chapter 5.3.4 Europeana and its potential in cultural tourism

Based on the focus group, the tourism industry organisation consulted recognise the value of Europeana and its content. However, the overall consensus emerging from discussing a variety of areas in more detail is that there is a lot of work needed to get Europeana ready and up to speed with what the tourism industry requires. All participants in the focus group highlighted the lack of awareness amongst the industry as to what Europeana is and what it does. Due to the lack in information tourism organisations have about Europeana, it is quite difficult for them to understand the opportunities for them and recognise that it might be a valuable content provider in the future.

Emphasising the value Europeana has for tourism is an essential step for the Europeana. It is also crucial to drive more tourism players to integrate and use Europeana content as part of their marketing and promotions. However, to stand out from other content providers and sources that tourist boards and organisations can quickly tap into, Europeana needs to show the added value of their content to drive visitors to a place. Focusing on topics and content that are not a niche is fundamental. Tourist boards need content that is unique and has a high appeal to visitors, which can easily transform into tourism products and compelling experiences.

Success will come to the Europeana if they can help to create a smooth experience for a visitor based on their content. A profound expertise in understanding what content is interesting from a cultural perspective but is equally attractive to be used by the tourism sector is needed. Understanding how tourist boards and organisations are using technology, images, videos and user intelligence to create tourism products and experiences can help in establishing which content should be put forward to different tourism players. In culture, nobody can deliver this kind of expertise at the moment. However, culture is accessible to anyone and people are using

cultural content available to them in the way they prefer. Europeana should, therefore, re-think its current approach and ensure that they can clarify what content is genuinely interesting for culture and tourism sectors alike and its use cases.

Considering how Europeana can help tourist boards to deliver the right content at the right time through the right channel is crucial. To adapt the current approach, nurture tourism needs and expectations and change the way in which cultural institutions currently provide content, utilised in tourism promotions and ultimately consumed in travel. The Europeana should establish itself as a thought leader and content advocate for the cultural and tourism sector, being an expert on cultural themes as well as understanding the particular needs of the tourism industry.

The potential for cultural content in tourism is high. However, the content provided by Europeana needs to be of good quality and appropriate for a tourism audience. Curation of content was considered an ideal way forward, as the Europeana has a wealth of material already aggregated but is not able to re-use not even a fraction of it. Having so much content in a database, Europeana needs to focus on actively curating content in a strategic way. Identifying interesting cultural themes that a band of cities is planning to use as part of their tourism promotions in the upcoming years is necessary. Curating specific content in line with the theme and collaboration with destinations on re-using the data is an ideal way forward. This way the content is adding real value to the overall promotions.

However, the Europeana should also consider that this might have to be backed by additional financial support for the promotional work of the destinations and cultural sector. There are already different funding opportunities for the cultural promotion. Those do not necessarily mean that Europeana and its content cannot actively be re-used but it means demonstrating the added value that Europeana brings, not financially but from a qualitative and demand point of view. Being able to 'compete' with cultural institutions that are being subsidised when working on certain cultural themes is possible, especially when providing content that has international potential when attracting visitors.

The Europeana needs to think in a more commercial way, as this means being more efficient and strategic with its overall approach. Establishing clearly what value Europeana can bring, actively driving awareness about their content and different opportunities for the tourism industry to work with them. The focus group agreed on the fact that there are real opportunities for Europeana and its content and database. Collaborating with Europeana is what the tourism industry needs, as nobody else can deliver great content, an understanding of how the industry works and a core expertise in the cultural sector. Being a reliable and value driven content partner that can be an equal partner in tourism promotions is something that Europeana can develop.

Europeana has a solid database and technology in place and its open source approach is appealing to the tourism industry. The startup scene in tourism is also always looking to explore tools and technologies such as the Europeana database which offers open-source content. Startups aiming to create a valuable tourism product to secure funding for its full development can actively look at Europeana. It is, however, not in the interest of the startup scene to curate the content available in Europeana's database. Although Europeana is not ready to distribute its content yet to the startup scene and tourism industry, it needs to work actively in collaboration with them to see which content should be curated.

Chapter 5.3.5 Strategic Recommendations

Based on the discussions and findings taking place as part of the focus group, a couple of strategic recommendations were mentioned which are further outlined as more concrete tactical and strategic actions in the next chapter. The Europeana needs to raise awareness and emphasise the value they can bring in the entire tourism industry. The majority of industry professionals consulted were completely unaware of Europeana. The Europeana can actively

help to create great content as part of tourism promotions, specifically targeting international markets.

Improving the awareness of Europeana needs to be closely combined with the need to make Europeana's 'product' tourism ready. Europeana's current content will not be fit for purpose and due to existing competition of other cultural content that is available, Europeana needs to show a clear added value. By being very clear about why Europeana content is more fit for purpose for the international promotion of cultural tourism, tourism organisation can justify the strategic decision to prioritise Europeana content over other cultural content available.

Europeana's content offering should not necessarily focus on the quantity of content available but on the quality and value it can bring to tourism organisations using it. Working closely with cultural institutions, the Europeana can lead the process of collecting and sharing unique tourism and cultural themes to share these with the tourism sector. A quality approach can also help establish Europeana as a brand and content provider in tourism.

The focus group also confirmed the need for the Europeana to invite the tourism industry, startup community and other interesting players to a workshop or Hackathon where Europeana content can be used to create new and exciting tourism products. It is necessary to work in close collaboration with the tourism industry and Europeana in contributing curated content. The event should produce viable products and tools for the tourism industry to support, promote and use.

The Europeana should also work more closely with the tourism startup scene to find ways of funding tourism projects. Although Europeana might not be able to support organisations directly with funding, it would be beneficial for them to work on identifying new models of financing and opportunities within the tourism industry.

Chapter 5.3.6 Executive Recommendations and Conclusions

There are a few key recommendations that can be made based on the outcomes of the focus group:

- 1. Raise awareness about Europeana among the wider tourism industry**
- 2. Demonstrate the added value that Europeana can bring**
- 3. Important to carefully select and curate content, and then strategically distribute highly curated content**
- 4. Consider investments needed for the curation and distribution process**
- 5. Understand it is a long-term approach when working with the tourism industry**

Chapter 6 Strategic Findings & Recommendations

The following chapter outlines the strategic findings deriving from the extensive industry consultation with a total of 17 industry players that was carried out to build a foundation for the implementation plan. Having consulted tourism professionals ranging from global players, regional players, national and city tourism boards as well as travel and technology providers, a range of findings and recommendations were collected. All of these were structured into topical clusters and will be presented in the following.

It is important for the Europeana to make critical strategic decisions and establish an annual programme of activities dedicated to the tourism industry. Undoubtedly, this will require significant investments both with regards to extending the Europeana team further and investing into tourism activities for Europeana's distribution in the tourism market. Further to that, this will also require the help of experts which can support to deliver an active programme of activities in the tourism sector.

The strategic findings and recommendations draw attention to the need to commit fully to tourism. Due to the complexity of tourism, the Europeana needs to invest significant resources in raising awareness about the organisation and its content with a long-term view in mind. The Europeana should not underestimate the need to give direct value to the tourism industry.

There is no shortcut when establishing itself in the industry or actively working in tourism. Although the content is of primary importance in tourism, the industry currently is not interested in Europeana's content. However, this nevertheless means that there is potential for Europeana in tourism. Acting on this potential and the opportunities in tourism means building Europeana up to become an organisation that is ready to venture into tourism, understanding that there might not be any quick results but focus on the long-term success.

The following strategic findings and recommendations are summarised both on a strategic and tactical level. When reading these, it is important to consider that not all of these are necessary for Europeana to commit to at the start. Many of the actions are built on the success of other strategic and tactical foundations laid. The strategic and tactical recommendations should be used to put together a consistent annual programme of activities that over time can achieve the strategic and vision outlined in the tourism industry.

All actions that are described in detail as part of this recommendations chapter are also mentioned as part of the implementation plan. Repeating these, provides an additional layer of understanding in the form of set outcomes, milestones and annual plans which can help the Europeana to consider the implementation and strategic delivery of activities in the tourism sector.

Depending on the level of commitment to tourism, the Europeana or an Executive team member will work on a business plan, outlining a plan for Europeana's tourism activities, setting goals, objectives and indicating a clear direction. Based on this business plan, a suitable funding model will be selected. All of the points mentioned as part of the strategic findings and recommendations can serve as input for future decisions that will have to be made.

Chapter 6.1 Long-term Strategy and Vision

Europeana needs to adopt a long-term strategy and vision for tourism, going beyond thinking about the end goal which is to get the tourism industry to re-use Europeana's content. This is an important cornerstone for Europeana's long-term strategy and vision, especially with regards to their visibility in tourism, the selection of reliable content partners as well as establishing industry

partnerships. The strategic findings and recommendations outlined provide a clear plan for Europeana to actively put these into practice, starting to follow a strategic action plan and deliver elements clearly described as part of the implementation plan in the next chapter.

Europeana's long-term strategy and vision firstly need to identify how the Europeana can make a mark on cultural tourism and the industry in general. It is important to follow a clear stance on what added value Europeana can bring. Europeana needs to establish its brand and communication entirely new in tourism, tapping into the insights gathered as part of the industry consultations. Ensuring that Europeana is a major driving force to get culture in tourism the recognition it deserves and accomplish an actual buy-in from tourism players to cooperate and collaborate with Europeana.

This vision and long-term strategy need to be supported further by Europeana committing to invest resources into the realisation of Europeana's potential in tourism. Essentially this would imply that Europeana is committing to make tourism an equally important channel for the re-use of Europeana's content, similar to what the organisation is already doing for both education and research.

Activities in tourism need to be developed, following a clear strategy in establishing tourism as an attractive business field for Europeana. With greater financial support being available for culture and tourism, Europeana can help to stimulate growth and innovation especially among small and medium enterprises as well as already established European tourism providers and bodies.

Chapter 6.1.1 Visibility in tourism

Visibility in tourism or rather the lack in visibility among the wider tourism industry was one of the core outcomes stemming from the industry consultations. The Europeana needs to establish itself in a whole new way, clearly communicating its values, brand and stance in tourism to the wider industry. It is important not to limit Europeana to how the organisation is currently perceived. We, therefore, recommend taking a blue sky thinking approach, particularly with regards to developing creative ideas that are not limited by current beliefs. It is vital to ensure that Europeana is breaking the boundaries and limitations faced by many non-profit organisations. This should be particularly the case given the added value Europeana brings and the real impact and potential it can have in tourism.

Europeana is without a doubt considered a credible and relevant organisation in the cultural sector. For the tourism sector, this experience and credibility is advantageous, however, Europeana needs to start building relationships in tourism, being realistic about the amount of work needed to establish these. Europeana also needs to raise awareness about Europeana and essentially what added value they can bring for different tourism organisations through their distribution in tourism. Further to that, meaningful conversations with tourism professionals and organisations need to be established to start a cooperation. The aforementioned will lead to tourism players and tourism boards understanding Europeana's relevance for them and also for the work they do. Meanwhile, it will enable Europeana to establish meaningful cooperations.

The tourism industry has an increasing demand for content due to consumers being able to access a range of information at all times. Tourism marketers need to offer unique content which a consumer would normally not be able to access. However, this means that Europeana needs to work significantly on the relevance and value of content presented for the distribution in a tourism context. Some improvements have already been made to Europeana's database, especially with regards to general usability, search and the content itself. Further improvements are needed to cater to the particular requirements of the tourism industry, including:

2. An overall higher quality database
3. Improved search for tourism related content

4. Efficient filtering system ready for tourism needs
5. Relevance of data and results

More specific recommendations will be outlined as part of the strategic action plan, emphasising what work Europeana have to carry out given being 'ready' for actively increasing its visibility in tourism. When approaching individual players in the tourism industry, it is important to understand that the Europeana will only have one opportunity to be considered an organisation that is worth engaging and working with.

Chapter 6.1.2 Reliable content partner

Apart from Europeana needing to find its vision and long-term strategy for tourism, as well as increasing its overall visibility, it is also important to ensure Europeana is considered to be a reliable content partner. As part of the strategic action plan, some ways will be outlined, helping Europeana to position its brand and activities appropriately for tourism. In practical terms, Europeana needs to ensure that tourism professionals, marketers, policy makers and ministers are clear about the type of content that Europeana has collected. In the past, Europeana's primary focus was on aggregating content from cultural institutions across Europe.

Working closely with a large number of cultural institutions, Europeana's content aggregated in the database has the approval of these cultural institutions, making it relevant and exciting to use. Being a reliable content partner means that Europeana needs to do more than just aggregating content, especially when looking at the tourism sector. Tourism is using highly visual content, meaning there are high expectations towards the style, quality and type of content that can easily be searched for and used directly. Europeana needs to change the way in which it has worked with cultural institutions so far, following a more quality focused approach in tourism.

There is a need for Europeana to work on dedicated content collections for tourism and work in close collaboration with tourism marketers to ensure these are fit for purpose. Delivering these content collections should be done with the help of tourism professionals, ensuring tourism collections are used when carefully put together by Europeana due to the significant time investments needed. Providing not only content but being a thought leader for digital tourism content means it is easier for Europeana to add instant and real value.

Europeana should also position itself as a thought leader in the field of culture and cultural tourism, showcasing best practice examples and campaigns that have proven to be successful, inspiring the tourism industry to tap into the power of content. The Europeana should provide not only content and support but also be a content leader, understanding the changing role of content and consumer demands and trends that marketers should take advantage of.

Chapter 6.1.3 Establishing partnerships

The need to establish strategic partnerships can be considered another essential outcome of the industry consultation. The need and type of strategic partnerships are outlined more concretely as part of the tactical and strategic action plan. In general, the Europeana should carefully identify the right partners, channels and partnerships to tap into and pursue. Further to that, Europeana needs to ensure the right approach is taken to establish the initial partnership and an adequate timeframe is chosen to achieve it. Timing is essential, as the tourism industry follows a general timeline regarding the preparation for trade shows, launching campaigns, planning budgets and determining a thematic focus for years to come.

Europeana only has one attempt at establishing a viable partnership. It is important for Europeana not just agreeing on partnerships without a particular project, outcome or goal in mind. Identifying a partner's needs and establishing how Europeana can support them can make a partnership mutually beneficial and worth investing resources. This way, Europeana can

become a relevant and essential partner that is worth working with instead of accumulating partners without any actions in tourism.

It is also important to consider that bureaucracy might be a factor limiting Europeana's current success in tourism. For tourism organisations, it might often be a difficult choice to select which partner to work with. The Europeana, therefore, needs to ensure that it is overcoming bureaucracy. Demonstrating a clear value that makes it possible for tourism organisations and partners to justify easily a collaboration internally and externally will provide Europeana is an adequate partner to cooperate with.

The Europeana should consider different approaches to get buy-in from global, regional or national tourism bodies to establish a long-term partnership that is mutually beneficial.

Chapter 6.2 Strategic Action Plan

The strategic action plan outlines all strategic actions the Europeana needs to implement to be successful with the distribution of their content in tourism. While Europeana's vision and long-term strategy in tourism was outlined in general, the strategic action plan goes much more in detail. The plan emphasises step by step what efforts Europeana should take with regards to making sure it has a chance in becoming an established organisation within tourism. Further to that, the plan also includes information on how to work with a range of tourism organisations, boards and businesses on delivering great content to be re-use in their activities.

The outcomes of the industry consultation focus on the following key areas, which are outlined in more detail as part of this strategic action plan:

- Awareness
- Partnerships
- Communication and Marketing
- Relevance

Chapter 6.2.1 Increased awareness

Currently, Europeana is focusing on reaching out to both the end consumer as well as businesses and organisations involved in different sectors as part of the communication of some channels and products. For tourism, the Europeana needs to follow a simple business to business approach, working with organisations that are prepared to curate content further, rather than organisations that cannot curate any content themselves. The aforementioned is particularly important when considering the content readiness for visitors and travellers wanting to research travel related content. This is particularly the case for organisations such as TripAdvisor, Google, or Booking.com, where content is only interesting if it can be re-used directly which is currently not the case.

Currently, Europeana content is interesting, but needs to be re-packaged and used as added value for existing content used by tourism brands to make it more relevant and interesting. Limiting Europeana's efforts to a business to business approach also means that it is more strategically focused and more impactful in the long-term.

The Europeana needs to ensure that its overall brand positioning and communication are strong and consistent. Undoubtedly, Europeana as a brand is already established in culture but in tourism the Europeana needs to position its brand much more strategically. Due to the in-depth industry consultation already carried out, there are many insights and findings for Europeana to base a strategy on. Being an established brand in the cultural sector as well as having a good

reputation and contacts can be used to Europeana's advantage when entering the tourism industry and establishing itself as a brand among tourism professionals, marketers, policy makers and ministers.

Europeana has an enormous credibility in culture and can take advantage of long-term partnerships already established with leading cultural institutions throughout Europe. The fact that Europeana has ran as a stable and successful organisation for years, means that it will be straightforward to establish Europeana's brand in tourism.

Europeana's current brand values such as credibility and quality are positive and can support its brand positioning in tourism. However, Europeana's brand name in tourism also needs to cater to the needs of players in the tourism industry who look to package and reach end-consumers with Europeana data. It is therefore important to stress the fact that the Europeana understands the tourism industry, its challenges and has identified clear opportunities for the tourism industry to tap into and benefit.

Being aware of tourism trends and changes taking place in the industry, understanding how this will impact on Europeana and its activities in tourism. Adapting to these changes and developments in tourism should be considered as an opportunity for Europeana rather than limiting the tourism efforts. To be able to establish meaningful relationships in tourism, it is important for Europeana to be able to draw strategic recommendations for tourism players, indicating how they can use Europeana data to add value to existing activities and tourism strategies.

Actively building Europeana's brand in tourism also means investing into both a communication and marketing strategy but also having visibility at Europe's major travel trade shows, being present at the tourism industry's most important events and conferences throughout the year. Each travel trade show produces a keynote or conference programme as well as an exhibition space where tourism players have stands to enable meetings and networking among the industry. The aforementioned is a great space to explore opportunities in tourism, learn about the key trends impacting on the tourism industry and establish needed relationships in tourism. Recommendations on which travel trade shows to attend are given in the following paragraphs.

In year two of the implementation of tourism actions, the Europeana should take part in the conference track of selected travel trade shows, establishing itself as a thought leader in cultural tourism, sharing insights, best practices and opportunities. Europeana should also book appointments with strategically selected contacts at tourism boards. As part of travel trade shows, the Europeana should also book appointments with relevant tourism ministers, lobbying for culture in tourism, learning more about their current activities and establishing what collaboration and funding opportunities there are. Tourism board directors are also present during travel trade shows, making it possible to establish relationships.

Travel trade shows are an ideal opportunity to network, meet, learn and foster an understanding of the tourism industry and its individual players. The following travel trade shows should be considered a must go to:

FITUR 20-24 January 2016 (International Tourism Trade Fair in Spain, Madrid)

FITUR is a global meeting point for tourism professionals, focusing on the inbound and outbound Ibero American markets. Each year, UNWTO uses the conference track of FITUR to put together a programme focusing on tourism development, sustainable tourism and tourism innovations, bringing together a mix of tourism ministers and leaders to discuss the most pressing challenges for the year ahead.

ITB Berlin 9-13 March 2016 (International tourism trade show)

Each year, ITB Berlin welcomes over 23,000 visitors to its conference and 115,000 professionals visiting the trade show to network, meet, do business and start the tourism year to plan campaigns and activities. ITB also has an extensive conference programme, focusing on bringing together tourism ministers and tourism providers, organising different thematic tracks as part of the conference programme.

WTM London 7-9 November 2016 (World Travel Market, London)

As the last travel trade show in the year, this is a key opportunity to meet and learn about changes in the tourism industry for the upcoming year. WTM is organising many events in the lead up to WTM such as minister meetings and dinners, as well as dedicated events focusing on tourism sustainability, tourism development organised in close collaboration with UNWTO and other leading tourism bodies.

For the Europeana being present at travel events is considered a good opportunity to increase the current awareness and visibility of the Foundation in tourism and its content offering. The focus should be on demonstrating the real value that Europeana can bring.

Chapter 6.2.2 Strategic Partnerships

As part of the industry consultation, the need for strategic partnerships between Europeana and selected partners was identified as an apparent necessity. The tourism industry works along a schedule, impacted by a range of things. Budgets are typically planned and approved in autumn for the following year. Campaigns are planned up to 2 years in advance and many destinations are still following a thematic approach, changing each year.

Themes are typically selected based on market interests and also anniversaries in a destination, providing excellent opportunities for destinations and tourism businesses. Campaigns are carried out regularly throughout the year and apart from campaign activities, most common bank holidays as well as the summer months are busy tourism seasons. It is, therefore, important for Europeana to be aware of timings when approaching individuals. Depending on the type of partnership in mind, it is necessary to ensure that enough time is given dedicated to establishing a relationship.

In comparison to that, at the policy making and ministry level in tourism, it is mostly political decisions that are affecting the focus and strategy followed. Tourism priorities and steps a country is deciding to take are dependent on the outcomes of elections and the continuation or reduction of government funding. Any additional funding being available to the wider tourism industry through tourism grants is then dependent on global and European policy-making organisations in tourism.

When establishing relationships with the policy making and ministry level in tourism, it is important to lobby for the continued support of culture in tourism, engaging in two-way conversations. It is suggested that the Europeana should monitor and engage with decisions made by government and policy-making officials to stress the need for support and potential of culture in tourism. Being actively involved in policy recommendations on a European level, means increasing the awareness about the potential of culture in tourism, especially with regards to stimulating growth, supporting SMEs and encouraging innovation in the sector.

It is important to establish the right partnerships at the right time, thinking strategically about building relationships and developing these into beneficial partnerships to drive Europeana's vision in tourism. The Europeana should reflect on a strategic framework for each partnership, as it is important to analyse how time and resources are being invested as part of developing

opportunities. Each partnership needs to be mutually beneficial, opening up doors for further opportunities, aiming for a clear goal or outcome. Suggestions for partnerships are made in the table below. However, before establishing these relationships, it is crucial to have a more comprehensive, higher quality database overall and to have curated datasets useful for tourism.

When establishing partnerships, it is crucial for Europeana to determine how the partnership itself and any projects can be both commercially viable and also receive the expected visibility in tourism and among the target audience of the project. Working collaboratively with partners will have a positive impact on the reach, viability and outcome of the project.

We would suggest to establish a strategic partnership with European umbrella organisations first, focusing on ETC and ECM who have together around 150 members, providing sufficient opportunities to collaborate. Depending on the starting point of Europeana's venture in tourism and current developments within these organisations, it is recommended to plan a business model and adjust suggestions provided within this document as needed.

After approaching umbrella organisations and their destination members, the Europeana can then consider the viability in going beyond destinations, aiming to work with tourism businesses and tourism bodies such as ETOA and WYSE Travel Confederation. There are many different options for Europeana in tourism, however, these depend greatly on the current circumstances, business model and plan along with the overall funding that the Europeana has available.

| Strategic Partnerships | | | |
|-------------------------------|---|--|--|
| Partner | Core focus of organisation | Approach | Level of Partnership |
| UNWTO | Culture and tourism, tourism sustainability, tourism development | Thought leadership in culture and tourism, active contribution to UNWTO activities | Partnership based on active support of UNWTO cause |
| WYSE | Youth travel sector, supporting the global youth travel industry | Thought leadership of culture in youth sector promotions, work on content, participation in events | Partnership to provide tailored content for WYSE members |
| WTTC | Global authority on economic and social contribution of travel and tourism | Support WTTC in the promotion of sustainable growth in tourism | Partnership based on active support of WTTC's cause |
| ETC | Marketing of Europe as a destination to long-haul markets | Support ETC in the sustainable development of Europe, provision of curated content | Content partnership - Europeana as strategic content provider |
| ETOA | Advocacy for tour operators and suppliers of tourism services with businesses in Europe | Support in the promotion of Europe, raising awareness about opportunities of culture in tourism | Event partnerships, actively sharing knowledge, information through newsletters and during meetings with members |
| ECM | Improve competitiveness and performance of leading cities in Europe | Networking, knowledge sharing during conferences, newsletters | ECM to support Europeana as content provider and strategic projects with |

| | | | |
|------|--|---|--|
| | | | members |
| EC | Policy making and advocacy for tourism | Contribution to initiatives, lobbying for culture in tourism | Support EC in culture in tourism |
| NTOs | International awareness and promotion of tourism destination | Contribute content and material for promotional work, boost promotion to international audience | Support with tourism promotions, strategic cultural content partner for NTOs |
| CTOs | Promotion of city tourism | Highlight opportunities of cultural heritage, help boost city promotion to international audience | Support with tourism promotions, strategic cultural content partner for CTOs |

Chapter 6.2.3 Efficient Communication

To be able to reach the tourism industry, the Europeana needs to be efficient in its communication efforts. Raising awareness and visibility of Europeana in tourism, means being clear and straightforward with explaining what Europeana is and means. Right from the start, when venturing into tourism as a sector, it is absolutely crucial to remain consistent when establishing Europeana's brand and vision.

For Europeana, it is critical to use only appropriate communication channels and develop a go-to platform for culture and re-use in tourism. A dedicated website and platform for Europeana in tourism can support overall marketing and communication efforts of Europeana's distribution in the tourism market. It should be visually appealing, still on brand but appropriate for showcasing case studies and best practices from within the tourism and cultural sector.

Further to that, introducing a dedicated blog as part of the website including opinion pieces will lead to tourism marketers and professionals being up to date with developments and trends, fostering strategic thought leadership in tourism.

Marketing and awareness campaigns/ efforts

In addition to a dedicated website for culture in tourism, the Europeana also needs to think about the delivery of dedicated marketing and awareness campaigns further down the line. Mostly, this involves making sure that the wider tourism industry is gradually becoming aware of Europeana and its content. Travel trade shows are an ideal opportunity to be able to secure a slot as part of the conference programme, sharing some information about culture in tourism, best practices and Europeana. Further to that, having a dedicated and active Twitter account to share tourism related information and engaging with others is also an essential component of awareness raising in the industry.

Relevance

With all of the strategic actions outlined, the relevance of content and activities is vital. The approach Europeana needs to take has to be very much focused, due to limited resources available for tourism. Ensuring all content and activities are highly relevant will guarantee the successful use of Europeana's content in tourism. All activities and content should be reviewed on a regular basis, verifying relevance and appropriateness to fulfil set strategic goals and the overall vision outlined as part of this tourism distribution plan.

Chapter 6.3 Tactical Action Plan

In addition to the strategic action plan, the tactical action plan focuses on outlining concrete actions that the Europeana should aim to implement in order to successfully deliver its long-term strategy and vision for tourism. It is important to plan and structure the implementation and scope of actions in an efficient way, prioritising which activities and measures have to be implemented first and which ones should follow after.

Some of the actions outlined in the tactical action plan are built upon other actions due to the complexity of establishing Europeana in tourism. It is, therefore, important for the Europeana to establish a framework for all its activities to build on. The strategic action plan has already outlined some of the key pillars, the tactical action plan is built on which are awareness, partnerships, communication, marketing and relevance.

The tactical action plan adds a range of actions to the strategic foundation, indicating how the actions should be implemented in view of achieving Europeana's vision and strategy in tourism. As range of tactical actions need implementation. The Europeana needs to be aware of the complexity of actions needing to be implemented before Europeana can get traction in the tourism industry. It is also crucial to understand that establishing itself in the tourism industry will require a dedicated and strategic approach to be successful with the distribution of content amongst the tourism industry.

A thorough and consistent approach is needed to ensure all actions are implemented, supporting the overall strategic positioning and brand. With changes occurring and developments in the industry taking place, the Europeana needs to be able to amend its approach where needed.

Europeana should focus on the following areas:

- Brand
- Communication
- Product
- Usability
- Events

Each of these areas are equally relevant, especially with regards to the potential of Europeana in tourism and the further distribution of its content among different players in the tourism industry.

Chapter 6.3.1 Brand

Chapter 6.3.1.1 Establishing the Executive Team for Tourism Content Curation

The core expertise of the Europeana lies in the cultural sector. Currently, there is no dedicated team in charge of tourism content curation. With tourism being an important and significant sector to focus on, establishing a dedicated team for travel can enable Europeana to venture into the industry successfully. This involves building an Executive Team that is gradually building up Europeana's standing in the tourism industry and adds to the existing offering.

It is recommended to have an Executive Team consisting of 3 tourism professionals, as this means committing sufficient resources to establishing Europeana in tourism. Each team member will have a core expertise in tourism and culture, understanding the digital marketing landscape, being able to establish Europeana as thought leaders for culture in tourism. Each professional that is part of the team will have a dedicated role to ensure the Executive Team is efficient and can tap into the unique skills of each team member.

Two people in the Executive team should focus on editorial content, marketing, communications and development of content for the distribution in tourism. A third person in the Executive team should take up the role of business development, actively seeking opportunities for Europeana to share their work and vision at tourism industry events and conferences. The position will also require establishing relationships with a range of industry players, forming partnerships and actively sourcing cooperation opportunities. Selling the added value that Europeana can bring is key, especially when overcoming bureaucracy of Europeana working with tourism organisations.

Therefore, one person in the Executive Team needs to be in charge of populating a dedicated website, researching best practices, writing and sharing information about culture in tourism and Europeana on the website and social media, making it relevant to the tourism industry. Another person needs to be dedicated to actively reaching out to organisations, sharing their work on the website and working on sourcing opportunities for Europeana to present their work as part of conferences, workshops, Hackathons and other activities. Preparing regular newsletter updates and building up a sound tourism industry database is another priority for the team. Identifying opportunities for Europeana across Europe and actively meeting relevant partners in the tourism industry, building relationships and promoting the brand Europeana in the tourism industry to other tourism professionals is a crucial step.

Europeana will be able to expand its current team and skills further to cater to the needs of the tourism industry. The Executive team is responsible for the re-use in tourism and establishing Europeana's brand among the tourism industry, shaping Europeana's offering and strategic development to increase the current use of Europeana data and content across industry players. As the Europeana is currently mostly unknown in tourism, the Executive team will have to ensure that all activities are efficient and fall in line with Europeana's overall strategy. A wider number of tourism professionals and organisations are encouraged to actively engage with Europeana content and consider the re-use of Europeana content for their upcoming campaigns and activities.

It is also important to monitor other cultural organisations providing platforms containing a one-stop shop for content focusing on cultural events, dates and information which are integrated into tourist board websites. The Executive Team should explore ways of collaborating with them. It is also important to monitor and analyse initiatives and projects in the cultural tourism sector to see where there is competition and how Europeana could demonstrate additional value.

Chapter 6.3.1.2 Establishing Europeana's brand in tourism

Further to the development of the Executive team, it is also necessary to establish Europeana as a brand in tourism. Communicating a clear brand message, explaining precisely what Europeana is, what the Europeana does and why this is relevant to the tourism industry. With many organisations entering the tourism industry each year, it is important to ensure Europeana and its opportunity to re-use content stands out. With many tourism professionals having very limited time to spare, it is important to communicate the Europeana brand strongly.

Each touchpoint with a tourism professional needs to be mapped out by the Executive Team beforehand, carefully considering how a buy-in from various tourism professionals at different points can be achieved. Every touchpoint must reflect, reinforce, and reiterate Europeana's core brand strategy. This will ensure that tourism professionals and also leading organisations in tourism cannot just dismiss Europeana for not being relevant or interesting for them.

The Executive Team need to use their expertise in tourism and their understanding of the individual players in the industry to their advantage. Many organisations are re-focusing their

remit each year, ensuring they can provide added value for their members as often these will be contributing with a membership fee. Understanding how Europeana can support these organisations is critical when succeeding in the distribution of Europeana content and establishing meaningful and action led partnerships.

Understanding the remit of individual players in the tourism industry is crucial to establish their leverage. Being able to influence the decision to support and utilise the re-use of Europeana content is critical. Especially in tourism, a brand needs to be able to show how an organisation can directly benefit from a collaboration, partnership or, in this case, the re-use of Europeana content. The Europeana, therefore, needs to establish its brand with a concrete proposition when speaking to tourism professionals, tourism ministers or European institutions and umbrella organisations. This will enable them to understand how they can directly benefit and to what extent this is adding value to their current offering to be beneficial for their members or the network an organisation has established.

Chapter 6.3.2 Communication

Chapter 6.3.2.1 Dedicated Tourism Website

Creating a dedicated website for tourism is another essential tactical action for being able to communicate actively Europeana's offering in tourism as well as establish Europeana as a reliable content partner for the tourism industry to consider. The tourism website and offering should follow a similar approach to Europeana's current website approach for research and collections. It should focus on highlighting to tourism professionals how they can utilise Europeana content and what activities Europeana is carrying out year round.

The dedicated tourism site should be visually appealing, follow a definite structure and should be readily usable on both desktop computers and mobile. Combining thought leadership content with practical information as well as a clear call to action, putting together curated datasets will be an essential focal point for the site. The Executive Team also needs to be highly visible throughout the tourism site, ensuring that these individuals can also share their expertise and thought leadership on the topic of culture in tourism.

The landing page of the tourism website, clearly outlines the different areas of focus, including blog posts, showcasing best practices, trends and case studies from within the cultural and tourism sector. The site will also deliver an entry point for tourism professionals to access the database and research for content to re-use. Further to that, collections of pre-curated or interesting content for tourism use can also be displayed, specially curated for the use in the tourism industry.

Opinion led editorial content, showcasing some great cases of content being used in culture and tourism can help tourism professionals to understand what they should be doing and how Europeana and its content might be relevant to be used in the future. Video material in which the Executive Team explains the way in which Europeana content can be used for tourism or what key trends tourism professionals need to consider for their next campaigns will also be highly relevant and help to increase traffic to the website. The aim for Europeana is to be able to drive demand for Europeana, establishing it as a strong brand in tourism and a key opportunity for organisations to tap into. A blog-style section of the website can further provide some interesting insights and reviews of current projects.

It is crucial throughout the dedicated site for tourism to communicate the added value of using Europeana content and the different benefits of working with Europeana. A clear call to action needs to be included, in view of collaborating on projects, steps to re-use the content or be part in different projects to be launched or ongoing projects.

Chapter 6.3.2.2 Communication

The Europeana already has people contributing and collaborating on a national level. It would, therefore, be good to communicate regularly with these key contributors about the specifics of tourism, educating their contributors and at the same time reporting back about what Europeana is doing to increase the content reach and overall re-use in tourism. Although contributors are aware of the type of content that Europeana is aiming to aggregate, fulfilling certain standards, it would also be interesting to educate the contributing institutions about the particular needs and desired content the tourism industry is looking for.

Existing content that cultural institutions have aggregated and submitted to Europeana could be reviewed regarding suggestions for attractive themes or content collections that are already part of the Europeana database. With such a wealth of content, the Executive Team will find it difficult to browse through existing content, establishing its relevance to tourism. A regular exchange of thoughts and dialogue between cultural institutions and the dedicated tourism team will benefit the efforts of Europeana to understand which outstanding content individual cultural institutions are adding and whether there are patterns and special themes that tourism professionals can tap into. This can also help to speed up the process of highlighting content relevant for the re-use in tourism.

Distributing a regular newsletter including updates tailored for contributors as a stakeholder and audience will be highly beneficial especially with regards to informing them about activities in tourism, taking the opportunity to engage them in the process. Further to that, the Executive Team should also establish a consistent communication across relevant social media platforms. A dedicated Twitter and YouTube presence as well as a dedicated LinkedIn page could also be created, focusing on the tourism industry if the business model and funding allows for that.

This way, interested tourism professionals can regularly find out more information about Europeana's efforts and activities in tourism. Also, the Executive Team can seed information across social media channels and reach a bigger audience of potential users in tourism. Especially on Twitter, many hashtags can be used to provide thought leadership in culture and tourism. Besides, many events and conferences use specific hashtags, making it possible for the Executive Team to follow conversations, engage, pick up on trends and developments and react accordingly.

Although communication is necessary, it is equally important to be able to listen to what is happening in the industry, understanding which changes might impact on Europeana's efforts in tourism and be able to adapt its strategy, communication and approach accordingly. This intelligence will also be attractive to the Europeana. A close relationship needs to be kept between the Executive team dedicated to tourism and other groups within Europeana to ensure to learn from the experiences and approaches from the cultural and creative industries sector, applying learnings to tourism, looking at establishing further opportunities to boost the re-use of Europeana content in tourism.

Chapter 6.3.3 Content

Chapter 6.3.3.1 Content Development for Tourism

The Europeana already has a good knowledge about their database and can flag datasets as useful for the use in tourism promotions by marketers. Although there is great need for content in tourism, it is difficult to provide a comprehensive list of qualities that marketers need or are expecting from data and content. Depending on the type of activity that the content aims to support, the content requirements can change. As a general rule, content for tourism marketing

and promotions require the highest resolution possible to enable the use of images for example in websites and print. Marketers need content that is visual and can tell an engaging and inspiring story in a unique way. However, these are quite generic guidelines, as the specific requirements for print, digital brochures, website or promotional campaign material can vary greatly.

Marketers are faced with the ever growing demands of consumers when engaging with content, making it necessary for them to adopt a customer perspective and deliver content that is equally interesting for culture enthusiasts and the wider public. This requires them to take a multimedia approach when delivering content, ranging from showcasing great images, videos and written texts and content that is equally engaging and not factual or technical.

For the Europeana this means that content formats need to be consistent and comply with standards set by the tourism Executive team, making it necessary to narrow down the scope of information and flagging tourism relevant content. At the starting point of venturing into tourism, the focus should remain primarily on looking at ways in which Europeana content can support the further product development of tourism organisations.

It is recommended for the Europeana to closely work with the Tourism Executive Team, educating them about specific datasets that they consider as interesting for tourism. The Tourism Executive Team can then dive much deeper into the database and conduct a full assessment of the current potential of content based on their tourism expertise. This will require time investments into the creation of a tourism inventory, flagging content that is useful and interesting for tourism.

A detailed assessment of Europeana data fit for tourism is recommended as a pilot action before going ahead with the full implementation of strategic and tactical actions. Based on narrowing down the most interesting tourism datasets and identifying the most promising themes, the Europeana can then flag and tag tourism content. After that, the Europeana and the Executive Tourism Team if in place can identify pilot organisations to work with, establish relationships and deliver projects including Europeana data and content.

From an internal point of view, tourism can be an equally attractive and commercially viable sector in comparison to other more established ones that Europeana is currently working on. There is always great demand for tourism products and solutions that tourism providers can tap in. This could be in the form of developing dedicated tourism collections or thematic collections for the industry to use.

Rather than working on a conceptual basis, for tourism, it is important for Europeana's added value to be tangible, and the tourism sector can easily understand how they could just work with Europeana content straightaway without having to do much more work to improve its quality or making it relevant for tourism. Those organisations that can provide something that is instantly usable for tourism professionals tend to have the most success. Although experimenting with projects is an option, this is only recommended for testing purposes, to gather feedback to improve the quality, usefulness and relevance of projects. When targeting the wider tourism industry, products and offerings need to be already established and fit for use and purpose, as the time of tourism professionals to develop something with it, is often limited.

Chapter 6.3.3.2 Development of tourism datasets

Currently, the most viable product for the tourism industry where the Europeana can see immediate value in is the development of dedicated tourism datasets. This means, the Executive team, together with the tourism industry will select certain themes and topics that are relevant for

the use in tourism promotional campaigns and activities as part of marketing tourism destinations or tourism experiences.

The development of specific datasets on selected themes is critical for its joint use by the tourism industry. Providing unique content for the tourism industry to use is a significant opportunity for tourism professionals but also for Europeana to establish itself as a go-to, reliable content partner. However, the datasets themselves need to be relevant and carefully sourced both regarding the topic and content the datasets contain.

The tourism industry is demanding a high quality and resolutions of images and content pieces to be able to include them into campaigns. Further to that, the relevance of content also needs to be closely aligned with the overall topic of the campaign, adding value to the uniqueness of content.

With consumers being able to access a broad range of information freely on the web, the tourism industry needs to deliver something more unique, utilising inspiring content for users to see and experience. When marketing tourism products, creating a unique and entirely different tourism experience is essential - Europeana content can add this uniqueness and quality of already existing content that is part of the campaign or activity.

Once thematic datasets are identified and collected, it is important to ensure that the tourism industry is aware of these datasets, understanding the added value and opportunities to use them. Dedicated editorial content or video content should clarify and explain what the tourism industry can do with individual datasets, outline the terms and conditions that apply and provide easy access for the industry to access them.

If possible, dedicated workshops and events where the tourism industry comes together and meets can also be used as platforms to explain how the tourism industry can actively use existing datasets and work in a collaborative way to distribute and promote content based on a common theme. There is a clear opportunity, as the tourism industry often approaches campaigns, primarily to target consumers in long-haul and emerging markets, collaboratively, working on showcasing what a user can experience in different destinations and places based on a strong theme such as food, culture, tradition, art, fashion, etc.

This is ideal for Europeana to become a part of these efforts to showcase European's common culture by providing dedicated datasets that contain unique pieces of content that the tourism industry can use in the context of tourism.

Chapter 6.3.3.3 Improving the Database Usability

The Europeana, together with the Executive Team need to continue working on the usability of the database. Although some work has already been carried out, and both the usability of the database as well as the relevance of content has improved, there is still work that has to be done to cater to the particular needs of the tourism industry.

For tourism professionals, it is important to ensure the database is the best it can be and also the content of the database is of appropriate quality for the use in tourism. Tourism professionals need to be able to find easily relevant content, not being overwhelmed with too many results, that are not relevant or of bad quality and, therefore, unusable. Being clear about the rights of reuse is also an important part to clearly indicate so tourism professionals can easily make a judgement call whether content is interesting to use or not usable due to specific user rights being needed to utilise the content as part of promotional work.

Content in the database should be tourism approved, introducing a tourism tag, clearly showing which content is already approved for its use by a tourism marketer. Although this might seem to

be providing too much support, with time being very limited for tourism professionals to source content and actively re-use content, it is important to ensure that it is made very easy for marketers.

Unfortunately, due to the work of researching relevant content first and a time investment being needed, the Europeana needs to ensure that all of the work and decision making has already been taken care of by Europeana to make it easy and straightforward. This way, tourism marketers will be able to use easily the Europeana database and will access the database more often to find relevant content to be used.

Breaking down barriers is highly recommended to avoid the initial dismissal of Europeana as a content partner and the overall value of distributing its content as part of any partnerships or collaboration. The gradual improvement of the usability of the database, as well as the collection of tourism datasets which can also be featured within the database, will ensure that the strategic distribution of Europeana content is carefully planned and taken care of.

The Europeana and Executive Team need to ensure a solid foundation is in place before actively engaging and driving the tourism industry to the database. This is particularly the case to avoid the dismissal of the database or negative impact on the overall reputation of Europeana especially regarding its usability, relevance and readiness to cater to the tourism industry and its specific needs.

Chapter 6.3.3.4 Filters and Tags

The improvements with regards to the usability and quality of content featured in the database specifically for tourism professionals will already lead to changes in attitude towards the Europeana database. The overall filtering system and tagging approach is another area that should be changed, because of the current logic applied to filters and tags are based on the cultural sector. However, to be appealing to the tourism industry, it is recommended to approach tags and filters with the logic of a marketer.

First of all, this means that all tags and filters used are accurate, making it easier to search for particular content in the wealth of content available in the current database. Secondly, the database and functionalities such as tags and filters should enable a user to filter content smartly to reduce the number of results to a manageable amount for keywords used. Thirdly, this will enable the users of the database to pick content items, review its relevance for re-use and select only the best content to be used.

Lastly, it might also be interesting to consider the introduction of a quick search option, ensuring a user can access and search for keywords or themes that other tourism professionals might have searched. This could easily be done by providing certain keywords that could be interesting topics for the tourism industry and provide a nice overview of a range of results relating to the topic or keyword.

The datasets carefully curated by the Executive Team should be tagged, indicating that the content is part of a wider thematic collection of the dataset and that it has been pre-approved by a marketer with regards to its potential to be reused.

Chapter 6.3.4 Events

Chapter 6.3.4.1 Attending tourism events and presenting Europeana

To support the distribution of Europeana content further and to raise awareness of Europeana, its content and brand, the Executive team should attend tourism events and deliver presentations about Europeana. It is important for Europeana to establish itself as a thought leader for culture in tourism online. However, the awareness and visibility achieved online needs to be supported by actively taking part in industry events and engaging with industry players.

Each year, there are many tourism events that focus on digital marketing, tourism development or content in general. Although the topic of the conferences might not be directly linked to Europeana, the Europeana can still benefit from attending the event as well as looking to secure a speaking slot as part of the conference programme. Europeana needs to continue and share its thought leadership in culture and tourism among the tourism industry by presenting their work with an emphasis on some of the great cases the Executive Team is collecting and sharing as part of the Europeana tourism site.

When presenting Europeana in the context of a tourism event, it is crucial to educate the tourism industry about Europeana's expertise, aiming to establish mutually beneficial opportunities. This way, Europeana can improve and establish its brand and reputation in the industry. When speaking at tourism industry events, those speakers that genuinely add value rather than promote their product and sell are more successful, getting the industry to think about content for example first and then Europeana as a right partner. Speaking at tourism events can help establish Europeana as a thought leader, being at the forefront of culture and tourism, inviting the industry to be part of the movement.

Tourism industry events are also a great way of networking with attendees, which will be representatives from various tourism organisations. Educating them about Europeana and identifying the potential use cases and use scenarios when working with these different organisations can be quite beneficial for the follow-up work carried out by the Executive Team.

By attending these industry events, the Europeana Executive team will also be able to keep up to speed with developments, latest trends and general changes in the industry. A summary of takeaways can also be shared on the tourism site of Europeana, informing the wider industry about the learnings from the particular events. Attending the events will also inform them about how Europeana's strategic vision in tourism can be implemented more efficiently or on a wider scope. The intelligence and insights gathered as part of the industry events can then also be shared internally as well as with the different stakeholders the Europeana is working with.

Chapter 6.3.4.2 Participating in major tourism trade shows

Participating in the different travel trade shows in Europe is another essential part of the tactical action plan. The Executive Team will get actively involved in trade shows, helping to strengthen the brand and make people aware of Europeana, its content and database. To start with, the Executive Team should attend only the leading trade shows in Europe, making sure the Europeana presence is strategic and in line with the overall activities carried out each year.

The following trade shows should be of interest for the Executive Team:

FITUR 20-24 January 2016 (International Tourism Trade Fair in Spain, Madrid)

FITUR is a global meeting point for tourism professionals, focusing on the inbound and outbound Ibero American markets. Each year, UNWTO uses the conference track of FITUR to put together a programme focusing on tourism development, sustainable tourism and tourism innovations, bringing together a mix of tourism ministers and leaders to discuss the most pressing challenges for the year ahead.

ITB Berlin 9-13 March 2016 (International tourism trade show)

Each year, ITB Berlin welcomes over 23,000 visitors to its conference and 115,000 professionals visiting the trade show to network, meet, do business and start the tourism year to plan campaigns and activities. ITB also has an extensive conference programme, focusing on bringing together tourism ministers and tourism providers, organising different thematic tracks as part of the conference programme.

WTM London 7-9 November 2016 (World Travel Market, London)

As the last travel trade show in the year, this is a key opportunity to meet and learn about changes in the tourism industry for the upcoming year.

At each of these tourism trade shows, Europeana's Executive Team should aim to book appointments with key tourism ministers as well as associations and organisations that are normally difficult to meet face to face. Each meeting should be set up well in advance and should provide an overview of Europeana, explaining how the content can be used or how the organisation's members can benefit from Europeana content. Trade shows are an ideal opportunity to meet and build relationships with the leading people in the industry and ensure that Europeana is considered a key player among other European tourism organisations.

| Annual Calendar of Tourism Events | | | |
|-----------------------------------|---|---|---|
| Event | Target audience at event | Goal of attending event | Collaboration |
| January FITUR Madrid, Spain | Global, regional and national tourism organisations Primary focus on inbound and outbound Ibero American markets | <ul style="list-style-type: none"> • Attend UNWTO sessions as part of the programme • Schedule appointments with global, regional and national tourism organisations to share information about Europeana • Inform and share information about Europeana's activities in tourism • Strong communication of added value for individual organisations of working with or using Europeana • Europeana could also actively present | Partnerships with global and regional tourism bodies to drive cultural tourism advocacy |

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| | | its work as part of conference sessions based on cultural tourism or content | |
| March ITB Berlin, Germany | Global, regional and national tourism organisations Primary focus on meeting tourist boards and tourism organisations | <ul style="list-style-type: none"> Attend conference sessions Schedule meetings with global, regional and national tourism organisations to share information about Europeana | Partnerships with global and regional tourism bodies to drive cultural tourism advocacy NTO and CTO partnerships based on curated datasets |
| March UNWTO Meeting at ITB | Tourism and culture ministers | <ul style="list-style-type: none"> Meet and discuss opportunities | Tourism and culture advocacy |
| November WTM London, UK | Global, regional and national tourism organisations Agree on partnerships and activities for upcoming year | <ul style="list-style-type: none"> Attend conference sessions Schedule meetings with global, regional and national tourism organisations to share information about Europeana Emphasise added value Europeana can bring | Partnerships with global and regional tourism bodies to drive cultural tourism advocacy NTO and CTO partnerships based on curated datasets |
| November UNWTO Meeting at WTM | Tourism and culture ministers | <ul style="list-style-type: none"> Meet and discuss opportunities | Tourism and culture advocacy |

Chapter 6.3.4.3 Tourism training workshops for culture professionals

Tourism professionals are keen to explore the content of Europeana to identify unique content that can be reused as part of their campaigns and activities. For the Executive Team in tourism, it is crucial to organise workshops and training that can educate cultural professionals about the work Europeana is doing in tourism, as well as educate tourism professionals about the content, quality and thematic datasets that are available to them. This is, however, of course only possible after some of foundations have been worked on.

The Europeana should, therefore, consider organising workshops and training dedicated to the cultural and tourism sector. Dedicated training and industry workshop for the cultural institutions contributing can help them to understand the requirements and added value the tourism industry can bring. Also, to establish the potential of existing content in the database, the knowledge and expertise of interesting and unique content they have aggregated already in the database can actually help to establish how tourism could use these content opportunities.

For tourism professionals not having used the database before, dedicated training or a workshop is probably an opportunity to educate them about the database, its use and the content that can be accessed and used by tourism. An introduction into copyrights, overall reuse in tourism as well as the opportunity of using datasets and working with Europeana on creating additional datasets that can be used by the wider industry is mutually beneficial. Although it will be difficult to organise these workshops independently and regularly, there is demand for educating the industry and added value for tourism professionals to learn about a new content source for their marketing activities.

As the Europeana is organising regular presidency meetings, these could be used as an opportunity to speak to the cultural institutions and stakeholders about its activities in tourism and also educate about how Europeana adds value to this industry sector and why it is worth supporting Europeana's efforts. With a broad range of stakeholders present at the meetings, a work group for tourism could be started, focusing on ensuring quality standards will be met and input is given to ensure the distribution of Europeana content in tourism is still adding value to Europeana's overall activities.

A separate tourism track as part of Europeana's EU presidency meeting might be an interesting opportunity to focus on, once some of the groundwork in tourism has taken place. An advisory board of ten people with different backgrounds from tourism and culture could be created, strongly steering the direction for re-use in tourism, jointly managed and supported by the Europeana and the Executive Team responsible for tourism.

Chapter 6.3.4.4 Organising Events

The Europeana could also explore the opportunity to organise dedicated tourism events, aimed at tourism organisations and professionals to meet, discuss and learn about Europeana and showcase the opportunities for culture in travel. Ensuring that the event is genuinely useful for tourism, introducing a new concept for an event bringing together different stakeholders. The event needs to add value to the tourism industry in order attract people to attend and participate.

As Europeana is still relatively new to tourism and might not have sufficient contacts in the industry, it is an opportunity to consider tapping into an existing conference or campus which is already well established in the industry. Each year, there are a range of events, many now focus more and more on the production of content, content in general as well as existing and new consumer trends in tourism.

Tapping into an existing conference or campus, means focusing on the fact that the content presented, shared and discussed is genuinely relevant for industry professionals. Being part of the conversation at a conference and sharing unique insights into culture and tourism can strengthen existing relationships and help to build new ones. The networking opportunities can be utilised for Europeana's advantage, not having to organise or handle logistics.

The Digital Tourism Think Tank, for example, is organising an annual Content Campus on 1st and 2nd March 2016 in the Faroe Islands, focusing on hands-on learning, innovation and inspiration all around content and the social influence of the millennial visitor. Digital creatives, strategists and socialites, are attending the content campus, hearing keynotes from a range of leading content creators and marketers in tourism and working collaboratively on specific workshops. During these workshops, attendees will be hands on and create content, learning how to create amazing video content and images for their website and social media channels.

As part of the campus, attendees will also be able to try the latest gear in travel tech, being able to immerse themselves into creating content that is truly exciting and inspiring for the Millennial

traveller. In future editions of the content campus, it would be interesting for Europeana to come in and organise a co-creation workshop as part of the campus, working with tourism professionals on using Europeana curated content and the thematic datasets they can provide to the industry.

Thinking about the opportunities of organising a workshop or dedicated working group as part of a conference can also generate valuable insights for the Executive Team closely working with tourism professionals. The intelligence gathered from the events, can be fed back to the Europeana and if needed the conference approach can be adapted. Conferences can also be a good testing ground for business models, seeing what works and where there are improvements needed.

Apart from tourism conferences, working with the creative industries and tourism as part of a Travel Hackathon might also be interesting. A tourism organisation can name challenges that the creative industries can help to overcome. There are many hackathons being organised all across Europe. The Executive Team could provide content for these hackathons organised by other organisations, ensuring that developers have access to the database and help Europeana to be part of it and raise awareness among marketers and developers.

Currently, nobody is organising a dedicated workshop or hackathon combining tourism industry organisations, the tourism startup scene and Europeana as an active driver of content to be used. There is a need in the tourism industry to put together an event, leading the way in creating exciting and new tourism products to be used by the sector. Often when hackathons are organised, they are only targeting the developer community without necessarily involving the tourism industry. This is a huge mistake, as solutions are needed to meet the direct needs of tourism organisations.

Starting a direct discussion between the creative startup scene, tourism industry and European as a thought leader in cultural tourism will enable all parties to create mutually beneficial tourism products. As these are based directly on the needs of the industry, tourism organisations and partners can support the distribution of these solutions and tourism products and encourage their active use by consumers.

Taking into consideration funding that is needed to make these ideas, concepts and tourism products a viable product in tourism is also vital. The Europeana should together with the wider tourism industry offer more support to startup companies driving awareness about Europeana content as part of solutions developed.

[X Prize](#) is an ideal example of a great concept to follow and adapt to needs of tourism, becoming in innovation engine. The Europeana should follow a similar approach, encouraging the culture and tourism industry to think big, think beyond current limitations and create a whole new solution for tourism, highlighting the cultural offering in tourism in a fresh way to consumers. There are clear opportunities for Europeana to pioneer innovation in culture and tourism, actively leading the way and combining the best of all sectors in new and exciting tourism products.

Chapter 6.3.5 Funding

Funding is one of the areas that the Europeana has not considered yet with regards to tourism. With limited budgets available to tourism organisations at all levels, it is important to ensure that Europeana is considering where they can provide financial support and how. This does not mean that the Europeana should spend a huge budget on getting a buy-in from different organisations within the industry. However, it does mean actively considering that financial support should be provided where they are collaborating with individual or a group of organisations on working on the re-use of Europeana content. This, of course, depends greatly on the overall funding model

and overall business plan that the Europeana decide on when entering tourism as a new sector of their activities.

The Europeana should also look at how they can source funding opportunities for specific projects and activities in tourism, if the organisation cannot provide direct funding or investments into external organisations. As culture and tourism are sectors where there is greater financial support being available, it is critical for the Tourism Executive team to seek opportunities for additional investments in tourism related projects and activities. Identifying grants or investments by global or regional organisations could incentivise the wider distribution of Europeana content in tourism.

Unfortunately, many national and city tourism organisations have to justify their activities with a direct return on investment, not any long-term success. Investing time and human resources into a collaboration with Europeana in view of re-using their curated content might not be possible unless the Europeana can ensure to put an investment aside to support the collaboration of Europeana content used in a tourism marketing context.

Chapter 7 Implementation Plan

Chapter 7.1 Strategic Implementation Plan

The strategic implementation plan is merely a suggestion to help the Europeana in understanding what strategic actions should be carried out based on the previously outlined findings and recommendations. The implementation plan suggests different strategic actions, specifically looking at the individual actions, timescales, milestones and desired outcomes.

| Strategic Action | Timescale | Milestone | Outcome & Achievements |
|------------------|--|--|---|
| Awareness | Year 0 Establish clear brand positioning and strategy | <ul style="list-style-type: none"> Establish Europeana as a B2B Brand and content provider | <ul style="list-style-type: none"> Strong positioning and presence for Europeana as a Think Tank for cultural tourism |
| | Year 1 Raise awareness of Europeana among tourism online Raise the profile of Europeana as part of tourism events | <ul style="list-style-type: none"> Clear brand values associated with Europeana in tourism Clear brand values and strategy Clear communication strategy | <ul style="list-style-type: none"> Structured online presence Clear message on Europeana and its added value in tourism |

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| | <p>Year 2 Attendance at major tourism events</p> <p>Continued awareness raising of the Europeana brand in tourism across Europe</p> | <ul style="list-style-type: none"> • Europeana brand to establish itself further in Europe • Increase industry coverage of Europeana editorial content | <ul style="list-style-type: none"> • Pan European awareness and demand for Europeana brand • Regular attendance at industry events |
| | <p>Year 3 Establishing Europeana as a key cultural tourism organisation in Europe</p> <p>Continued communication and thought leadership in cultural tourism</p> | <ul style="list-style-type: none"> • Strategic communicating core messages • Being actively involved in tourism events and working in close collaboration with global and regional policy makers | <ul style="list-style-type: none"> • Awareness of Europeana among the whole tourism industry • Increased interest in Europeana and its content |
| | <p>Year 4 Awareness on a global level</p> | <ul style="list-style-type: none"> • Global communication of added value • Increased awareness globally | <ul style="list-style-type: none"> • Increase in global awareness and demand |
| Partnerships | <p>Year 0 Selecting appropriate partners (based on tourism business model)</p> | <ul style="list-style-type: none"> • Identifying strategic list of partners & approach (start with umbrella organisations) | <ul style="list-style-type: none"> • Fully committed partners |
| | <p>Year 1 Communicating and targeting strategic partnerships</p> | <ul style="list-style-type: none"> • Setting up partnerships and agreeing formally to specific activities | <ul style="list-style-type: none"> • Clear implementation strategy for the work with partners |
| | <p>Year 2 Establishing further partnerships on a pan European level</p> | <ul style="list-style-type: none"> • Agree on joint activities • Highlight Europeana's added value • Strategic selection of partners to increase the distribution of content in tourism | <ul style="list-style-type: none"> • Policy lobbying in Europe • Cultural tourism advocacy across tourism • Increase in demand for partnerships • Develop strong long-term partnerships with selected tourism |

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| | | | organisations |
| | <p>Year 3 Establishing global partnerships where interested</p> <p>Improve current partnership across Europe</p> | <ul style="list-style-type: none"> • Agree on activities with global organisations • Strategic distribution of content • Involve other strategic partners in selected activities | <ul style="list-style-type: none"> • Clear increase in joint activities with partners going beyond Europe • Emphasise the added value and ROI when working with Europeana • Commit partners to renewing partnerships into regular collaborations with Europeana |
| | <p>Year 4 Developing existing partnerships further</p> | <ul style="list-style-type: none"> • Explore how existing partnerships can be extended • Increase in global lobbying for cultural tourism | <ul style="list-style-type: none"> • Improvement of existing partnerships • Continued commitment and mutually beneficial outcomes of partnerships |
| Communication and Marketing | <p>Year 0 Establishing communication strategy</p> <p>Year 1 Awareness campaign</p> <p>Establishing of communication and marketing channels</p> <p>Strategic communication and marketing of Europeana in tourism</p> | <ul style="list-style-type: none"> • Setup dedicated tourism website • Clear benefits communicated of getting involved in culture in tourism • Setup dedicated social media channels • Regular communication and marketing of Europeana in tourism | <ul style="list-style-type: none"> • Regular editorial content on cultural tourism • (Video) case studies • Newsletter signup • Introduction of a regular stakeholder newsletter • Regular tourism focused newsletter to database • Regular sharing of content, information and insights into Europeana in tourism |

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| | <p>Year 2 Marketing and communication campaign Europe</p> <p>Marketing and communication strategy</p> | <ul style="list-style-type: none"> • Thought leadership across all communication channels • Clear communication strategy • Strategic marketing messages for different tourism organisations | <ul style="list-style-type: none"> • Consistent and strong messages • Strong communication of added value and importance of Europeana in tourism • Share insights into the culture in tourism sector • Communicate challenges and lobby for the implementation of solutions |
| | <p>Year 3 Marketing and communication campaign global</p> | <ul style="list-style-type: none"> • Increase communication to target the global tourism industry • Communication of Europeana as a thought leader • Ensure culture in tourism is a trending topic in tourism | <ul style="list-style-type: none"> • Clear focus on driving results through communication • Regular analysis of communication performance • Clear definition of ROI of Europeana communication activities |
| | <p>Year 4 Strengthening and re-establishing communication and marketing of Europeana</p> | <ul style="list-style-type: none"> • Strong and consistent communication across all platforms | <ul style="list-style-type: none"> • Clear communication and engagement results |
| Relevance | <p>Year 1 Identifying and establishing how Europeana is relevant for select tourism organisations</p> | <ul style="list-style-type: none"> • Clear communication of Europeana's added value across all communication & activities | <ul style="list-style-type: none"> • Clear relevance of Europeana for tourism |
| | <p>Year 2 Identifying what further added value Europeana can bring to other organisations</p> | <ul style="list-style-type: none"> • Identifying further USPs of Europeana | <ul style="list-style-type: none"> • Clear communication and presentation of added value for partnering and working with Europeana |

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| | Year 3 Emphasising relevance of Europeana for further organisations | <ul style="list-style-type: none"> • Clear communication of Europeana's relevance as a key player in the tourism industry | <ul style="list-style-type: none"> • Further partnerships and collaborations across Europe and globally • Europeana as the organisation driving culture in tourism • Establishing Europeana as a strong content provider and partner for the tourism industry |
| | Year 4 Re-evaluating Europeana's relevance in tourism | <ul style="list-style-type: none"> • Analysis and recommendations for Europeana's future relevance in tourism | <ul style="list-style-type: none"> • Clear vision and communication of the future of Europeana in tourism • Thought leadership for culture in tourism as an area |

Chapter 7.2 Tactical Implementation Plan

The tactical implementation provides suggestions for strategic actions, specifically looking at individual tactical actions, timescales, milestones and desired outcomes. Europeana should use this document as part of mapping out which core activities the Europeana should approach when planning Europeana's distribution in the tourism market more concretely.

| Tactical Action | Timescale | Milestone | Outcome & Achievements |
|--|--|--|--|
| BRAND | | | |
| Brand Awareness, Identity and Development | Year 0 Awareness raising & brand building in tourism | <ul style="list-style-type: none"> • Brand awareness among strategically selected tourism organisations | <ul style="list-style-type: none"> • Clear brand messages and communication |
| | Year 1 Establish brand awareness & | <ul style="list-style-type: none"> • Create demand for Europeana as a content provider and solution among | <ul style="list-style-type: none"> • Clear tourism offering which is communicated across channels |

| | | | |
|-------------------------------|---|--|--|
| | Europeana as Cultural Tourism Think Tank | strategically selected tourist boards | and platforms |
| | Year 2 Foster brand awareness & increase the demand for Europeana in tourism | <ul style="list-style-type: none"> • Brand awareness among wider tourism industry • Create demand for Europeana as a content provider to a wider variety of organisations • Strong presence at trade shows and events | <ul style="list-style-type: none"> • Strong brand communication via social media and website • High visibility as part of events, tourism campaigns and activities in tourism • High awareness of Europeana as a tool and solution |
| | Year 3 Develop Europeana as the go to content source for cultural tourism | <ul style="list-style-type: none"> • Brand development of Europeana as primary content source for cultural tourism | <ul style="list-style-type: none"> • High visibility and awareness of Europeana globally |
| | Year 4 Develop Europeana as an equally strong brand in tourism as in cultural sector | <ul style="list-style-type: none"> • Equally strong brand awareness in tourism as in culture | <ul style="list-style-type: none"> • Europeana in tourism as a strong brand and high value |
| Tourism Executive Team | <p>Year 0 Establish a dedicated person for tourism</p> <p>Year 1 Establish a dedicated Executive Team</p> | <ul style="list-style-type: none"> • One full time dedicated staff for tourism, outlining business plan for tourism • Having a full time dedicated team of 2-3 specialising in tourism • Developing a ready project for tourism | <ul style="list-style-type: none"> • Building relationships with tourism partners • Website dedicated for tourism • Regular communication with tourism industry • Strategic meetings and partnerships with select tourism organisations • Regular leasing with different players in tourism |

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| | <p>Year 2 Develop clear offering for tourism</p> | <ul style="list-style-type: none"> • Extensive curation of existing content • Development and delivery of tourism projects • Thought leadership as Culture Think Tank • Actively presenting Europeana at events, workshops, trade shows | <ul style="list-style-type: none"> • Portfolio of curated datasets to be used in tourism • Portfolio of cases studies and projects • Europeana tourism team is working on • Growing list of partners active in joint activities • Growing demand from tourism industry to work with Tourism Executive Team |
| | <p>Year 3 Increase team</p> | <ul style="list-style-type: none"> • Increase the dedicated tourism team in order to manage and work on a wider range of projects | <ul style="list-style-type: none"> • Establish Tourism Executive team as an integral part of culture in tourism industry |
| | <p>Year 4 Specialised team for different sectors in tourism</p> | <ul style="list-style-type: none"> • Increase and develop the team and its activities further, working also with international organisations | <ul style="list-style-type: none"> • Continued demand for tourism executive team in tourism |
| Communication | | | |
| Website | <p>Year 0 Mockup, Development & research</p> | <ul style="list-style-type: none"> • Plan for clear presentation of Europeana | <ul style="list-style-type: none"> • Thought leadership in cultural tourism • Thought leadership in tourism content |
| | <p>Year 1 Dedicated tourism website</p> | <ul style="list-style-type: none"> • Dedicated cultural tourism content • Opinion based Blog articles • Newsletter signup | <ul style="list-style-type: none"> • Active communication across channels and platforms |

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| | <p>Year 2 Inclusion of external content</p> | <ul style="list-style-type: none"> • Continuation with editorial content • Integration of video and social media content • Continuation with cultural tourism case studies | <ul style="list-style-type: none"> • Work with partners to contribute editorial or blog articles • Showcasing projects and Europeana activities in tourism |
| | <p>Year 3 Further development of tourism website</p> | <ul style="list-style-type: none"> • Improved inclusion of tourism datasets developed • Making website developments where needed to showcase content appropriately | <ul style="list-style-type: none"> • Integration of funding solutions and projects directly into Europeana tourism website |
| | <p>Year 4 Seamless integration of tourism database and portfolios of datasets into website</p> | <ul style="list-style-type: none"> • Smart integration of tourism dataset • Featuring projects in development | <ul style="list-style-type: none"> • Website as go to channel to find projects and opportunities to collaborate with Europeana |
| Newsletter | <p>Year 1 Basic newsletter signup and distribution</p> | <ul style="list-style-type: none"> • Setup of dedicated tourism database and newsletter • Basic newsletter analytics | <ul style="list-style-type: none"> • Easy newsletter signup form • Dedicated newsletter for culture stakeholders and tourism professionals |
| | <p>Year 2 Newsletter database and distribution</p> | <ul style="list-style-type: none"> • Continued development of dedicated tourism database and newsletter | <ul style="list-style-type: none"> • Driving newsletter signups • Regular newsletters being distributed |
| | <p>Year 3 Newsletters dedicated to drive demand</p> | <ul style="list-style-type: none"> • Strategic planning of newsletter messaging to attract partners | <ul style="list-style-type: none"> • Focus on providing interest based newsletter content |
| | <p>Year 4 Re-design of newsletter</p> | <ul style="list-style-type: none"> • Re-think current newsletter practices | <ul style="list-style-type: none"> • Providing fresh, new cultural tourism content |

| Development of Content, Tourism Datasets, Tags and Filters | | | |
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| Content development for tourism | Year 0 Prepare and pilot actions, set content standard for tourism | <ul style="list-style-type: none"> Develop and pilot tourism datasets Define partners | <ul style="list-style-type: none"> Clear use cases and insights from extensive pilots |
| | Year 1 Develop index of tourism content fit for use | <ul style="list-style-type: none"> Develop on demand tourism content in collaboration with tourism industry | <ul style="list-style-type: none"> Insights into product development practices in other sectors |
| | Year 2 Advanced content development | <ul style="list-style-type: none"> Develop tourism content approaching projects or clusters of tourism organisations to re-use them | <ul style="list-style-type: none"> Identify other opportunities for Europeana Close collaboration with Europeana product development team |
| | Year 3 Development of new tourism offering | <ul style="list-style-type: none"> Generating additional demand in tourism through new offerings | <ul style="list-style-type: none"> Strategic product delivery and generating opportunities |
| | Year 4 Improving viability of tourism offering | <ul style="list-style-type: none"> Understanding and responding to industry demand | <ul style="list-style-type: none"> Increase Europeana's content development structure |
| Development of tourism datasets | Year 0 Groundwork in preparation for development | <ul style="list-style-type: none"> Strategically identify datasets Highlight potential | <ul style="list-style-type: none"> Full index of potential dataset themes interesting for tourism |
| | Year 1 Develop dedicated tourism datasets for tourist board use | <ul style="list-style-type: none"> Develop tourism datasets and themes with selected tourist boards | <ul style="list-style-type: none"> Use of Europeana content in strategically planned destination promotion in tourism |
| | Year 2 Develop datasets for use by wider tourism industry | <ul style="list-style-type: none"> Strategically develop tourism datasets and themes with selected tourism organisations | <ul style="list-style-type: none"> Use of Europeana content in strategically planned tourism projects |
| | Year 3 Develop broader tourism datasets (relevant for different tourism | <ul style="list-style-type: none"> Strategically develop tourism datasets and themes with tourism and other industries | <ul style="list-style-type: none"> Use of Europeana content in strategically planned destination |

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| | organisations) | | promotion in tourism |
| | Year 4 Develop cultural tourism packages | <ul style="list-style-type: none"> Work with partners and develop complete packages to be used by tourism startups | <ul style="list-style-type: none"> Use of Europeana cultural tourism packages in strategically planned projects by different sectors |
| Improving database usability (for use in tourism) | Year 0 Evaluate usability of database | <ul style="list-style-type: none"> Identify UX and usability gaps | <ul style="list-style-type: none"> List of improvements |
| | Year 1 Improve database usability for use of tourism marketers | <ul style="list-style-type: none"> Create seamless user experience for tourism professionals | <ul style="list-style-type: none"> Easy use case for tourism professionals |
| | Year 2 Increase tourism focus of current database | <ul style="list-style-type: none"> Highlight additional tourism content in select parts of database | <ul style="list-style-type: none"> Easy access and seamless user experience when using tourism datasets |
| | Year 3 Continue improving overall usability | <ul style="list-style-type: none"> New features adding value to using Europeana (e.g. search, related content features) | <ul style="list-style-type: none"> High quality content database for tourism professionals |
| | Year 4 Adjust usability & technical solution of database | <ul style="list-style-type: none"> Improving database and make it fit for common industry standards | <ul style="list-style-type: none"> Increase in users accessing the database regularly |
| Filters and tags | Year 1 Re-think current filters and tags for tourism | <ul style="list-style-type: none"> Analyse current filter and tagging system Recommendations for changes fit for tourism purposes | <ul style="list-style-type: none"> New concept in line with tourism marketer needs |
| | Year 2 Curate and add marketer approved content | <ul style="list-style-type: none"> Introduction of marketer approved content Tourism content highlighted throughout the database | <ul style="list-style-type: none"> Positive experience for tourism professionals using the database Database fit for tourism needs |
| | Year 3 Add relevant tags | <ul style="list-style-type: none"> Increase tags and filters | <ul style="list-style-type: none"> Increased flexibility to |

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| | and upgrade filters | | respond to demand in the industry |
| | Year 4 Tourism content a standalone section in the database | <ul style="list-style-type: none"> Further expansion of curated tourism content and its access in the database | <ul style="list-style-type: none"> Higher use and demand for accessing the Europeana database and tourism content |
| Events | | | |
| Attendance of tourism events | Year 1 Attend a selection of tourism events | <ul style="list-style-type: none"> Strategic planning of attending content events, tourism conferences | <ul style="list-style-type: none"> Attendance and relationship building |
| | Year 2 Attend and present at tourism events | <ul style="list-style-type: none"> Attend and present at tourism, cultural tourism/ content conferences | <ul style="list-style-type: none"> Appointments with selected partners Visibility as part of tourism events |
| | Year 3 Organise dedicated tourism events | <ul style="list-style-type: none"> Europeana to establish an annual cultural tourism event | <ul style="list-style-type: none"> Regular exchange of knowledge Visibility for Europeana |
| | Year 4 Pioneer new and innovative culture in tourism events | <ul style="list-style-type: none"> Exploring other event or workshop opportunities in collaboration with global tourism organisations | <ul style="list-style-type: none"> Europeana to continue innovating in culture and tourism |
| Participation in Tourism Trade Shows | Year 1 Attend a selection of travel trade shows | <ul style="list-style-type: none"> Strategic planning of attending travel trade shows | <ul style="list-style-type: none"> Appointments with strategically selected tourist boards and partners Exploring opportunities and building relationships |
| | Year 2 Attend and present at travel trade shows | <ul style="list-style-type: none"> Attend and present at travel trade shows and cultural tourism/ content conferences | <ul style="list-style-type: none"> Appointments with selected partners and individuals Visibility as part of tourism trade shows |
| | Year 3 Actively contribute with partners at | <ul style="list-style-type: none"> Europeana to work with industry partners on organising specific | <ul style="list-style-type: none"> Exchange of knowledge Relationship |

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| | trade shows | sessions at travel trade shows | building <ul style="list-style-type: none"> Increasing Europeana's potential in tourism |
| | Year 4 Actively contribute to trade shows | <ul style="list-style-type: none"> Exploring the organisation of specific travel trade show tracks | <ul style="list-style-type: none"> Increasing long-term visibility and awareness of Europeana |
| Tourism training and workshops | Year 0 Identify training workshop needs | <ul style="list-style-type: none"> Identify exact demand Show the tourism industry how to use the database | <ul style="list-style-type: none"> Knowledge on opportunities Breaking down barriers avoiding the tourism industry to use Europeana content |
| | Year 1 Offer workshops/training on demand for tourism professionals | | |
| | Year 2 Organise workshops and training for strategic partners in the tourism industry | <ul style="list-style-type: none"> Ensure all partners and tourism professionals can use database Re-use workshops and training | <ul style="list-style-type: none"> Awareness of datasets and opportunities Working on use cases with content |
| | Year 3 Workshops and training to work with datasets | <ul style="list-style-type: none"> Educate tourism professionals about thematic datasets, access and use | <ul style="list-style-type: none"> Wider awareness Hands on work with Europeana content |
| | Year 4 Workshops/training to show changes | <ul style="list-style-type: none"> Educate and showcase changes made to database and content | <ul style="list-style-type: none"> Demonstrate the value of content Demonstrate use case opportunities |
| Organising Events | Year 1 Tapping into existing conferences/events | <ul style="list-style-type: none"> Actively contribute with a Europeana section as part of existing programme | <ul style="list-style-type: none"> Discuss and present opportunities of co-creation Dedicated co-creation workshop |
| | Year 2 Organise a working group focusing on co-creation | <ul style="list-style-type: none"> Organise a working group for culture and tourism | <ul style="list-style-type: none"> Get key tourism partners to attend Actively work with Europeana content |

D3.4: Plan for Europeana's distribution in the tourism market

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| | <p>Year 3 Organise a travel and culture Hackathon</p> | <ul style="list-style-type: none"> • Dedicated travel Hackathon inviting tourism industry, startup scene and Europeana content • Consider funding needs | <ul style="list-style-type: none"> • Input from tourism professionals • Viable tourism products to be used by tourism industry |
| | <p>Year 4 Organise a standalone culture in tourism event</p> | <ul style="list-style-type: none"> • Dedicated culture in tourism event attracting the wider tourism industry • Thought leadership in culture in tourism | <ul style="list-style-type: none"> • Attendance of key tourism partners and professionals • Closer collaboration with individual partners |
| Funding | | | |
| Support with Funding & Fundraising | <p>Year 1 Identifying financial support needed</p> | <ul style="list-style-type: none"> • Establish what financial support tourism partners need | <ul style="list-style-type: none"> • Work on concrete funding concepts for the work with tourism industry |
| | <p>Year 2 Actively working on tourism investments</p> | <ul style="list-style-type: none"> • Working with the industry to identify funding and investment opportunities for culture in tourism | <ul style="list-style-type: none"> • Identify strategy investment opportunities |
| | <p>Year 3 Supporting fundraising for projects</p> | <ul style="list-style-type: none"> • Launch fundraising opportunities for culture in tourism partners • Identify new business models | <ul style="list-style-type: none"> • Feature fundraising/ investment opportunities |
| | <p>Year 4 Lobby for funding opportunities</p> | <ul style="list-style-type: none"> • Liaise with key partners to raise funding for culture in tourism projects | <ul style="list-style-type: none"> • Thought leadership in culture in tourism fundraising |

Chapter 8 Conclusions

In conclusion, this tourism distribution plan demonstrates a strategic approach for Europeana to venture into tourism as a sector providing multiple opportunities and ways to succeed. Although the Europeana is not currently active in tourism, the Europeana brand and offering can add real value to the tourism industry. However, there is a significant amount of work and investments that need to go in realising the full potential of Europeana in tourism.

The Europeana needs to build awareness around cultural tourism, its brand and the added value that Europeana can bring. This needs to be combined with extensive communication across the industry. By venturing into tourism, the Europeana needs to follow a very strategic and long-term approach to use available resources and lead to success.

Europeana's database and product for tourism need a considerable amount of work before it is possible for the Europeana to realise its full potential in tourism. There is a definite demand and indication across the industry, demonstrating that there are various opportunities for Europeana to succeed in this sector. Europeana's content need to be tourism marketer approved and its overall quality needs to match the industry's expectations. The Europeana and its work with cultural institutions across Europe can help increase the quality and relevance of tourism content through the strategic selection of tourism datasets to be used.

The Executive Team, responsible for Europeana's venture into tourism will also serve as a driving force to establish Europeana in tourism. A dedicated website, showcasing information on tourism, along with a strategic communication approach and social media channels to be used can help to improve Europeana's visibility and awareness in tourism.

Further to that, the development of strategic partnerships will help to increase Europeana's standing in the industry. These partnerships with leading tourism organisations in Europe will also enable Europeana to become a leading content provider. Actively being part of a range of tourism initiatives and projects, will further highlight the high cultural tourism offering.

The tourism distribution plan outlines in detail all strategic and tactical actions that can help Europeana to boost its potential in tourism. Over a suggested course of a four-year implementation plan, the Europeana will be able to succeed in the strategic distribution of Europeana content in tourism.

Addendum

Chapter 1.1 Global organisations

Chapter 1.1.1 The World Youth Student and Educational Travel Confederation

Consultation with Wendy Morrill (Research and Education)

Approaching WYSE Travel Confederation as a part of the tourism industry consultation resulted in valuable insights worth considering for Europeana seeking to establish partnerships with other well-established organisations.

WYSE Travel Confederation is an important transnational tourism organisation founded in 2006 through the merger of the Federation of International Youth Travel Organisations (FIYTO) and the International Student Travel Confederation (ISTC) to create a stronger united body to represent the global youth travel industry. WYSE Travel Confederation is, therefore, built on decades of experience and recognised as a long-standing and trusted in the global community. ISTC (founded 1949) and FIYTO (founded 1950) was formed amidst post-war efforts to foster peace and cultural understanding through social tourism. The philosophy was that student travel and the exchange of ideas it encourages, contributes positively to education and plays an important role in developing greater international understanding.

Culture as an incentive to travel might not be the on top of the agenda for young travellers, but it certainly has some areas that Europeana can tap in. Addressing the latest travel trends in youth travel could lead to fruitful cooperation. The birth of youth travel and vibrant industry that it has become today was fostered by WYSE Travel Confederation with a mission to promote cultural understanding and world peace by inspiring young people to travel.

WYSE Travel Confederation is the world's largest and most powerful network of youth and student travel operators. Members of WYSE Travel Confederation are leaders in the unique types of travel products and services that young people utilise. WYSE is committed to understanding the ever-changing characteristics, motivations, and needs of young travellers. Gathering, analysing and sharing critical market intelligence with members, academics and government decision-makers is a core priority, satisfying the unique and ever-changing needs of the youth market.

Discussing the place of cultural heritage in youth travel and the potential of Europeana content resulted in the following conclusions:

Awareness and cooperation

Europeana is not well established as a content provider nor is it known in the travel sector. There is high potential establishing relationships with large travel agents as it is beneficial for both parties. Large tour operators and travel agents would certainly be interested in re-using content that Europeana has gathered. Tour operators and travel agents have not only vast resources for marketing, but they are also ready to use the content and communicate the cultural heritage of destinations they are selling.

Europeana has a unique offering of content on a variety of subjects, making it appealing to large companies, looking to create things that are unique to them. They have the resources and can take raw content and create something new and fresh out of it. Once the message about Europeana content availability spreads among the industry, large tourism companies will look at

Europeana for added value content for campaigns and overall marketing and communication activities.

One of the ways to raise awareness of the potential of Europeana resources among the community of large tour operators and travel agents are ad hoc cooperations with one or a few major tour operators. This could mean organising a contest, designated to building promotional campaigns using Europeana resources. It would also be interesting to see what young travellers could do using Europeana resources.

A potential framework for a contest could be to work with a travel agent providing the competition prize and for contestants to create a unique product using Europeana resources. The promotional campaign results in the creation of a tourism product or communication approach, which can be used by tour operators. With Europeana resources, the wider community of tour operators and travel agents can also see the value of tapping into these freely available resources, leading to increased visibility for Europeana.

Targeting the right people

The discussion on establishing potential partnerships reaching the tourism industry led to an apparent conclusion that the only way to make Europeana visible and substantial in tourism is addressing the right people. Europeana resources need to be communicated to those responsible for marketing, digital and creative within tourism organisations. Those in charge of marketing, digital or overall creative, are often not attending major trading events whereas their colleagues in sales or business development are not the right people to speak to or meet up with.

Even for umbrella organisations such as WYSE Travel Confederation it is challenging to reach those in charge of marketing, digital and overall creatives within their member organisations, because these are often not attending events or trade show activities. The clear focus of Europeana should be on identifying the right target audience in tourism organisations for the re-use of Europeana resources and communicating effectively through appropriate channels to reach out to them.

This can be done through direct contact with marketing teams or reaching out to wider audiences as part of events, focused exclusively on digital, marketing and creative industries. It is necessary to identify key opportunities to raise awareness about Europeana resources and ensure that these are taken advantage of by building the bridge between the re-use in tourism and meeting the specific needs of the tourism industry.

Partnerships with pilot projects

Looking for ways of Europeana to establish and be of use in the tourism industry, partnerships participating in pilot projects with other institutions could advance Europeana. There are a range of projects in tourism, focusing on content creation of niche products for tourists.

The usual barriers in approaching tourism product development are limited access to content and resources available that could be relevant to the particulate project. Through established partnerships, it is possible to target the tourism industry and develop products that are ready to be introduced widely as a result of pilot projects, and can inspire others.

Provide local experience

Travel trends are evolving and changing constantly, so the approach of cultural institutions also needs to be adapted considerably. Europeana as a content resource is capable of offering inspiration to the future generation of young travellers. It is clear, that culture will remain a significant focus of tourism, as museums and local culture are important, but the ability to attract travellers depends on the presentation of cultural aspects and the way in which tourism players engage travellers in culture. The dominant trend is that travellers demand to experience a destination or attraction in an immersive way, taking into account mobile technology and overall

relevance of content with regards to design and context. Taking the very traditional approach to showing a framed painting in a museum does no longer have the potential to inspire travellers.

Another important trend to consider is the inclusion of the traveller in everyday activities, allowing them to experience a destination through the eyes of a 'local'. This is where the re-use of digitalised resources has high potential: creative use can be very appealing to travellers regarding the combination of information in a destination with a digital layer of content and experience content. Finding ways to make visitors feel cultural aspects surrounding them, including them in the creation process, using the right technology, is much more appealing than merely consuming the result of a creation.

Establish relationships with associated organisations

Approaching associations in the travel industry could also result in raising awareness and increasing visibility. Talking to industry leaders such as WYSE Travel Confederation and building relationships can spread the word about Europeana resources among the industry. There are opportunities to publish information about Europeana on WYSE's platform and the inclusion of relevant information for their members into newsletters to get the word out to the industry and reach a wider audience.

Forming a partnership with WYSE Travel Confederation can enable Europeana to target and reach industry players directly through a credible platform and is an efficient way to distribute the message about Europeana and its potential for re-use in tourism.

Executive Conclusions and Recommendations

In considering the above points which came out of this consultation, it is clear that Europeana is a credible and appealing database and having considered certain issues, it could target the youth travel segment and convey the potential of re-use through to the wider travel industry. The key issues should be addressed:

- **Raise awareness and cooperate with the youth travel sector**
- **Identify the right people within tourism organisations**
- **Search for opportunities to partner in pilot tourism projects**
- **Focus on providing local experience**
- **Work with associated leading organisations**

Prioritising these points will ensure that Europeana can leverage opportunities arising from the fast growing youth travel sector and the growing demands for content to be used for marketing and communication purposes. Europeana has the clear potential to add value and provide resources that are unique which can be used by large travel companies to create something unique for the Millennial traveller.

Chapter 1.2 Regional organisations

Chapter 1.2.1 The European Commission

Consultation with Carlo Corazza, (Head of Unit "Tourism, Creative and Emerging Industries, DG-GROWTH, European Commission) and Eric Philippart, (Tourism Unit, DG-GROWTH, European Commission)

The European Commission has been consulted as part of the industry consultation in order to gain a more concrete understanding of their views in terms of their continued support for financing Europeana, where they see the opportunities for future development and initiatives.

From the point of view as the body funding Europeana, the Commission feels that overall communication is good and that they have a clear overview and understanding of what Europeana are doing and the activities that have already taken place in the sector. There is however a general feeling that a lot more can still be done with the right strategic approach in place and by working with the right partners in order to achieve the key goals of succeeding in the distribution of Europeana content in the tourism industry. These areas have been broadly outlined in the seven key points below.

Visibility and Awareness

As a starting point, the most obvious focus needs to be on raising greater awareness and visibility about Europeana amongst the tourism industry. There are a number of ways in which this can be done, the most obvious of which would be to establish a presence at the leading travel industry trade shows and industry events.

This might be as simple as getting the word about Europeana out in the tourism industry through presentations and workshops to explain what Europeana is and to share case studies of successful projects to date.

Establishing Strategic Partnerships

Europeana has already done some activities bringing people from different National Tourism Organisations (NTOs) together to engage with them on development products. Looking at developing this further, the European Travel Commission is an obvious starting point as they represent all of the National Tourism Organisations in Europe and have resources in tourism marketing which are far greater than those of Europeana.

The European Travel Commission (ETC) have more than 50 years' experience and although they struggle to do some things, the Commission believes they are a key player which is why they themselves continue to support ETC. ETC have good experience in branding Europe and they are well placed to achieve visibility to reach wider audiences.

Building Relationships at Different Levels within the Industry

There are opportunities at different levels for Europeana to engage in developing more activities for the tourism industry. A good reference to successful past work is the work done around the commemoration of World War 1, where memories of survivors were the focus point of creating a strong product which is viable from the point of view of a tourism offering. In order to achieve this, Europeana engaged IT professionals and the outcome was considered a success and stands as an example of how collaborations can lead to the successful re-use of Europeana.

Europeana should carefully consider where they build relationships and what the aim of those relationships are. It is clear that to achieve something as great as Europeana, work is needed at a European level, rather than working at the different National Tourism Organisation level which is harder. When looking at Europeana and ETC, there are clear synergies and both are tasked with many of the same aims, such as promoting and selling Europe's heritage and indeed both are funded by the same stakeholders.

With significant financial support being made available to both organisations individually at a European level and access to funds for different creative initiatives available in different Director Generals of the European Commission and the institutions such as the Parliament and Council of Europe there is certainly scope for collaboration and joint activities. Clearly more can be done than what is currently the case.

Focus on Storytelling

The success of the World War I work is an example of how Europeana can have a key role to play. Europeana has been successful in bringing people together to set out their different visions and developing a product or marketing activity out of that.

Going further in this idea, a lesson from the World War I work is that the strength of Europeana was the complication of stories that could be related to real people and brought into a contemporary context. In this sense, Europeana's value for tourism must go beyond the resources as they are and develop a more human angle or context to them. The Van Gogh yourself web service was a good example of how a technology was used in a playful way to get people to engage with art. Similarly, Google have long-term development projects which are developing similar projects.

Innovation and Creative Application

There are many great examples of how Europeana can be used in various different applications which the tourism industry could benefit from. To achieve this, providing Europeana content to developers is considered a key starting point so that they can add a layer to applications and sites when they're being developed. It's worth looking into the business models of other industries, such as online gaming, to look at how they have been able to start with a free-to-access model and build activities from there as a starting point.

Europeana Pro and Labs are great examples of good work in this area rather than trying to develop things that don't offer any unique value and where there's already an active market place and the use or awareness of Europeana risks being overlooked or drowned out. To ensure a better adoption and re-use of Europeana however, there needs to be a stronger investment in creating awareness amongst the developer and creative community. A current search for 'tools for developing applications with heritage' returns Europeana on the 4th page, which means nobody finds it. More can be done in SEO and direct marketing to change this.

It is also worth considering that for tourism, visitors don't need a deep resource on heritage, they often just need a picture of a cathedral before 1914 and that is it. Therefore, the context and curation of content needs to be right for the application and for the audience.

In considering the above points which came out of this consultation, it is clear that there is strong support for Europeana and a clear belief from the European Commission that it needs to establish stronger links with the tourism industry at a European level. In achieving this, there is the possibility to fund more activities either through existing programmes by harmonising them through a stronger tourism and cultural sector collaboration and also through new funds, where a case has been made or new business models developed.

Executive Conclusions and Recommendations

The European Commission feel very positive about Europeana, the work that has been done to date and its future potential in building relationships with the tourism industry. Building on this feedback, potential outcomes would look to achieve some of the following:

- **Establish broad Tourism Industry awareness**
- **Develop key partnerships at a European level**
- **Establish a forum for partnership initiatives**
- **Greater understanding of tourism industry needs**
- **Innovation and power creative collaboration**

Prioritising these points will better satisfy the needs of the European Commission in providing further funding into initiatives that also support tourism development and marketing and also ensure that Europeana is better placed to be more effective in its approach to tourism.

Chapter 1.2.2 European Travel Commission (ETC)

Consultation with Miguel Gallego (Head of Marketing and Communication)

The European Travel Commission (ETC) is the main institution on a European level, promoting the brand Europe and engaging in European tourism promotion in the long haul markets as well as bringing together 33 national tourism boards. ETC is a well-established organisation that is committed to the improvement of the tourism business environment within Europe. The organisation mainly engages in two streams of activities - events and policy-making. The recommendations as a result from the consultation with ETC are important to consider as valuable insights when moving forward.

ETC's mission is to strengthen the sustainable development of Europe as a tourism destination and to increase competitiveness, through knowledge gathering and sharing amongst members and lobbying. Further to that, ETC is also establishing a professional marketing platform for the successful promotion of member countries in overseas markets. ETC currently promotes the brand 'Europe – a never-ending journey' and the VisitEurope.com portal.

The European Travel Commission is aware of the activities of Europeana, but have not considered using Europeana resources for the promotion of European tourism due to a number of reasons. If the feedback from ETC is integrated, new opportunities for Europeana will arise relating to the distribution in tourism. The areas of focus for Europeana have been outlined in the below five points.

Visibility and Awareness

Infinite information in today's society requires a very focused approach to reach the potential end consumer. Currently, the communication of Europeana is not sufficient to reach potential tourism partners. This inadequacy must be addressed and the obvious steps forward are based on the existing and well-established channels, such as ETC itself. There are many industry meetings that are considered as opportunities to reach out to National Tourist Boards and their individual tourism industries. It is also possible to test current Europeana resources and its potential through the ETC network. However, there are serious doubts that Europeana resources are ready for re-use in tourism and the feedback from national tourism boards will also echo this initial assessment by ETC.

To establish an appropriate information dissemination network, it is important to use the right channels. ETC, being a channel to reach out to their 33-member tourist boards, sees a potential for Europeana in attending different tourism industry events and presenting the platform, so the interested parties can actively consider it for their tourism activities. This could be the focus for major tourism fairs in Europe such as WTM in London organised in November each year or ITB in Berlin organised in March each year. Europeana could focus technology or digital marketing sessions within these trade show events or focus on targeted events for national tourism boards focusing on digital marketing, such as the Digital Tourism Innovation Campus in Barcelona which welcomes a big majority of ETC member states.

Quality of the database

According to ETC, the current state of the Europeana database is in need of improvement before actively raising awareness of the availability of content and resources among national tourist boards. It is critical to consult the tourism industry to clearly define areas of improvement that are necessary from a user point of view. Europeana should work with more partners from the travel industry and start an active interaction between the cultural sector and tourism, as currently the platform is considered more appealing for education.

Relevance to tourism

Europeana and its database is a valuable project, but from a tourism point of view, it is currently not relevant. The focus on culture is too historical and does not seem attractive to travellers. European tourism bodies require the aggregation of content supporting cultural landmarks or points of interest to attract travellers to destinations in Europe. Tourism marketers accessing the database and browsing through it will find old and low-quality images of sculptures and paintings. This content is too narrow in its appeal to visitors and makes it difficult for ETC and its members to use it. The only way Europeana can get more relevance for the re-use in tourism, is broadening the scope of partners to reveal the potential. Working with NTOs and CTOs could result in identifying what content has the potential to enrich and engage tourists which can make culture more appealing.

Partnerships with the tourism industry

It is recommended to partner up with national tourism boards seeking for further collaboration with Europeana through possible content exchanges. Meeting content needs from national tourism boards can help Europeana to work on merging rich cultural content and making it attractive to the end user. ETC itself is also interested in re-using content that is relevant for travellers. For this to be viable, a totally different approach must be taken from Europeana. The target group in ETC's promotion of Europe as a brand are long-haul markets and its end users using Europeana content to spark the desire to discover Europe. Existing content in the database is too broad and academical and with Europeana's user interface not being attractive and easily usable, it would require considerable investments from ETC that the organisation is not ready to make. ETC's current approach when identifying content is to use it in promotional work is to re-use content that members of the organisation provide, which can usually be re-used immediately or with little effort, as it is ready for the traveller and meets its needs. Europeana and its content have limited appeal for visitors and the information provided is considered too broad and, therefore, irrelevant for ETC and its members. There is, however, potential, especially when considering preselection of content after consulting ETC and the destination members which could work for the benefit of Europeana seeking to establish itself within the tourism industry.

Culture as an inspiration for travel

ETC has carried out research that indicates culture as an very important trigger for travel. Culture and unique history attract most of the visitors in Europe. It is a clear indication that transforming cultural resources into a form that a traveller can consume is crucial. From the tourism perspective, culture is a source of inspiration to travel more. Culture available online can be developed into a product that is attractive to use and shows visitors that cultural assets are an important factor for exploring Europe.

Currently, there is a slight detachment of culture and tourism throughout Europe and the European Cultural Routes is a good example for that. The experience of a press campaign and travelling through one of the cultural routes in Europe with bloggers identified a weak point: Cultural Routes are not designated to appeal to the majority of travellers, only for culture enthusiasts. This applies to Europeana as well - it is a great database for people genuinely interested in the culture of Europe and this is a niche part of the wider potential audience. If addressed appropriately, Europeana can create a demand for tourism but the content needs to be presented more appealing as part of the database. Culture is a source of inspiration and is necessary for the further growth of the travel industry. However, the cultural sector needs to work together with tourism and adapt its resources creating a demand for culture and the use of Europeana.

Europeana has certainly high potential for tourism in the future, once taking into account the identified issues. Before going ahead, there is a need to re-visit the potential collaboration between Europeana and umbrella organisations such as ETC and their members.

Executive Conclusions and Recommendations

The European Travel Commission has a basic knowledge of Europeana, but has not made use of it until now, having the perception it is not ready to be used in tourism. Working on the issues identified below, cultural heritage that is accumulated by Europeana could make a difference for ETC and its promotional efforts both for the brand Europe and collaborations among its members. Therefore, the issues must be considered first:

- **Raising visibility of Europeana resources**
- **Improving the database quality**
- **Identifying the relevance for tourism**
- **Building Partnerships with the tourism industry**
- **Employing culture as an inspiration for travel**

Chapter 1.2.3 European Cities Marketing

Consultation with Flavie Baudot (Head Office Manager)

European Cities Marketing is an organisation working to improve the competitiveness and performance of the cities in Europe. ECM is a platform for conventions, leisure and city marketing professionals to exchange knowledge, best practise and widen their network to build new business.

The core activity for ECM is to facilitate the marketing of the member cities, they are not only the experts in the field but have also built a reputation in knowledge exchange and a wide network of partners. This is a major asset for Europeana and it is important to prevail trends and position cultural heritage in the city marketing context. Moreover, it is also an excellent platform to raise awareness of Europeana resources available for city tourism boards and tourism information centres.

Exploring Europeana's potential in city marketing is an important step, as it raises awareness throughout the organisation serving as a platform for destinations and being a leader in city promotion. The insights provided by Flavie Baudot from European Cities Marketing are essential for Europeana to consider before moving forward.

Considering trends in tourism marketing

It is necessary to consider city marketing trends before building relationships and putting together datasets accordingly. Trends are changing fast, but being able to meet the needs is crucial: changing the strategy accordingly is important. City marketing trends are changing, especially with regards to the Meetings, Incentives, Conventions and Exhibitions (MICE) sector. Being the focus of major tourism income in ECM's member cities, the organisation is monitoring and assessing these trends carefully.

Culture used to be a critical contributor when selling a city for conventions, although culture is now losing its popularity in city marketing. For a few consecutive years, culture was part of the bid when selling a destination. Now it has shifted towards industry intellectual capital concentration. This means the choice to hold an event in a city is much more influenced by the ability to have infrastructure concentrated. For example - if a pharmaceutical company is organising a conference, they prefer all the intellectual capital to be based in the city. In tourism, culture still has its place, so Europeana resources can be utilised for city marketing efforts, selling culture as a part of a city's tourism product. City marketing nowadays focuses on the promotion of the living experience of a city, featuring something unique, emphasising the inhabitants that are ambassadors for the city and providing tools to enable visitors to experience more.

Content Quality

The most important question any city marketer has to consider while choosing content is the quality of data that has to be sufficient both for standard and quality for the use in promotional campaigns. Currently, the quality of data is a huge issue for Europeana: the search function is not ready to respond to the needs of the users and items that are freely available are rarely of good enough quality to use for promotional efforts.

Cities are promoting their activities with a focus on using high resolution and stunning images that can inspire potential visitors and add value due to their uniqueness. In the current database, content quality is not up to standard for cities, making it difficult to use in promotions. However, Europeana content can be useful for creative city promotion, but it is clear that it needs work and careful selection, making it currently appealing to the creative industries only rather than the wider city marketing community.

Brand Europeana promotion

Low awareness of Europeana in tourism is a challenge that needs addressing. Certain values such as being a major provider of credible information on European cultural heritage and being a well-established network of cultural institutions need to be communicated more clearly to potential audiences for re-use. Europeana needs to approach the tourism industry with a strong brand and a clear communication message. The brand qualities should appeal to tourism including national tourism organisations, tour operators and other tourism players.

Europeana should involve their network of contributing organisations for the promotion: museums and other cultural institutions should be more involved in promoting available content for the tourism industry. A closer collaboration between contributing organisations and considering the relevance of resources for particular industry players would be useful steps forward towards introducing the re-use of Europeana on a bigger scale.

Content type

There are different players in tourism that might be of interest, however, each segment should be addressed differently. Europeana needs to establish appropriate channels and filtering of information for destinations to establish what is relevant for them. Cities are more interested in cultural highlights. Tour operators that specialise in culture could also be interested in using resources but need to be approached in a way that is appealing for a particular organisation.

The content that is on the database is not useful directly for the end user, however, working with popular channels such as Pinterest is a good starting point to promote content that is appealing due to its uniqueness and niche. The selection of material is also quite simplistic and less appealing to a mainstream audience. When exploring the Europeana database, one thing is obvious for ECM: the content now can only appeal to a small fraction of users. The majority cities and marketers are focused only on things that are currently trending, using cultural and historic content to inspire travellers further. Narrowing the data scope, developing datasets on topics that are linked to major tourism landmarks or unique objects in a destination is a good direction towards distribution among the tourism industry.

In considering the above points, there are two ways to approach the tourism industry: finding the data relevant for a particular player or trying to find the intermediaries within the countries that are the contributors for Europeana content.

Executive Conclusions and Recommendations

European Cities Marketing believe that Europeana is an inspiring database for creative people and with a few improvements it has a future potential in building relationships with the tourism industry. It does not necessarily have a big potential for city marketing, but culture is an important niche market in tourism, making it necessary to address some of the below conclusions before building relationships with ECM and the wider European city community:

- **Follow trends and adapt tourism approach accordingly**
- **Improve and adjust quality of the content**
- **Promote the Europeana brand for the tourism industry**
- **Work on content types**

Chapter 1.3 National Tourism Boards

Chapter 1.3.1 Polish National Tourism Organisation

Consultation with Anna Cichonska (Expert in the Strategic Department)

The Polish National Tourism Organisation was consulted to gain a clear understanding of Europeana's value for tourism reflecting on it from the perspective of a national tourism board. Poland, as a member of Europeana, is one of the most active contributors of data, having provided nearly 2 million items in the database. Poland, as a part of the pilot project with Google Niantic Labs was part of the development of the mobile app re-using Europeana resources. This project is known as a turning point for Europeana, entering the tourism industry. The app gives a deeper understanding to the user willing to learn about archaeological sites, historic buildings and monuments in Poland, Estonia and Sweden.

Anna Cichonska has a long expertise in tourism, as well as being part of the team at the Polish national tourism board developing their national tourism strategy for years. Being an art lover herself, the interview with Anna Cichonska provided some valuable insights that are essential to consider for Europeana, looking to establish partnerships with European national tourism boards. The key points, summarised below are crucial to consider for partnerships with national tourism boards.

Partnerships between cultural and tourism organisations

As a first step, Europeana should be looking for a comprehensive cooperation between culture and tourism organisations. Mutual work and strategic partnerships between the two sectors is a major step forward, exploring the potential of cultural heritage to be used more for travellers. Tourism always benefits from the promotion of culture but building strategic partnerships on a national level is difficult. There is a regular cooperation on a strategic level, but working on a country promotion or strengthening the promotion of cultural heritage, has not been successful so far.

Destinations have a very genuine interest in culture, as the majority of destinations in Europe are branding culture as an integral part of their identity. Limited engagement with cultural resources is the result of the focus on main highlights only in the form of monuments and museums. The average tourist is not interested in extensive resources, but there is the risk of missing compelling content without going deeper. Most tourist boards are under the impression to have enough information to promote themselves as a cultural destination and this is where conversations with partners from the cultural sector get complicated. However, the input cultural institutions have for tourist boards should not be underestimated.

Tourist boards can use Europeana data and take advantage of a reliable channel to convey the message. Establishing partnerships need to be the first stage of working together: understanding the needs of one another, it's quality and scope for use as part of a successful promotion. Europeana must serve as an inspiration for cross-sector cooperation, as it leads to more successful promotion and more efficient selection of data for Europeana.

Raising Awareness

It is obvious that the current information on Europeana is not sufficient for tourism: raising awareness and increasing visibility should be established as the principal goal. The message should be delivered on a European level. National cooperation has not worked effectively since national cultural institutions have been taking part in Europeana Network activities creating the need to approach the tourism industry for potential cooperation.

Europeana has to establish itself as an institution bringing cultural and tourism institutions together and inspiring further cooperation. It would meet the overall project goal and make culture more accessible through partnerships. Europeana has already been successful in gathering people from cultural organisations to collaborate so there is a tremendous potential to go further and establish itself as the organisation inspiring the use of culture for tourism promotion. There is a demand to develop this further and it is a strategic step forward. Europeana might also use the expertise of other supranational organisations that have already worked in linking tourism and culture such as the European Institute of Cultural Routes. This has to be considered as an exemplary mechanism to interconnect industries and raise awareness for the tourism industry.

The first steps that are recommended to focus on are raising greater awareness and visibility about Europeana amongst the tourism industry, through taking the role of a leading organisation bringing tourism and culture together.

Focus on customer perspective

Europeana resources are vast and it prevents the wider public, as well as the tourism industry, from using the platform. The main criteria for filtering the information that can potentially be used for tourism promotion is to keep the customer perspective in mind. Currently, there are a few issues with Europeana as a potential resource for promotion from the customer perspective.

From a tourism perspective, there is a clear distinction between tourists that are interested in culture: domestic and from abroad. The benefits of Europeana resources are invaluable for domestic tourist for several reasons. Firstly, most of the data is available only in the local language and it is a barrier for inbound visitors. Secondly, the amplitude of interests for the majority of travellers might limit the potential use of resources for promotion: tourists are interested only in the main attractions and they are only going to big museums to see the main highlights. As an example, tourists staying in Poland 3,5 overnights on average are not likely to be inspired by the deeper exploration of small museums and its resources. From the user perspective, even successfully integrated content is likely to be relevant to a small group of users, mostly domestic travellers.

Unique selling points

The most efficient way forward for Europeana is to identify the unique pieces of data related to specific destinations and propose to use it. The first step is to find something unique and base the offer on that. Tourism boards are limiting their search, as they believe to have enough promotional material but being the best experts of the collected data; cultural institutions can identify the unique pieces of data that are not used anywhere else and have a potential to highlight the destination. Finding unique selling points relevant for destinations is the right way to approach tourism boards. It is also worth considering that the focus is on finding areas in Europeana that are unique and could not be located anywhere else which then shows the added value for destinations using Europeana as a cultural content resource. Limiting the resources available and offering NTO's only interesting and unique things that cannot be found elsewhere will be a unique selling point.

Identify the niche

Exploring the potential of Europeana being successful in re-use means identifying the niche where Europeana is relevant. Focusing on the customer perspective is important while estimating and choosing the resources offered to travellers and this applies to national tourism boards as

they are customers of Europeana data. It is important to select the most relevant information that could be useful to them. Tourist boards are not interested in promoting the destination for a very limited number of people. As the resources they use for promotions are limited, even providing the unique information might not be appealing to the tourist board due to the size of the niche the tourist board would be able to target. There is a large risk that even successfully identified niches might not bring very tangible results: cultural niches can be very limited. Europeana needs to continue working on winning over destinations that believe to have enough promotional content but can be convinced to see an added value of using Europeana resources.

User interfaces and data filters

The websites developed by Europeana are too complicated to use and do not have the interface that is appealing to tourists or tourism boards looking for inspirational material to promote their destinations. Apart from a small group of people who are rooted in academia, the majority of users are image orientated and delivering visual data has to be prioritised. Currently, there is too much textual information on Europeana and the functionality of the website has not been developed accurately. Often the information is too many clicks away if a user wants to reach an individual object within the database. Currently, Europeana does not have an attractive product for tourist boards and this is the reason they are hesitant to invest resources and use it.

To succeed in the development of the websites, the inspiration of successful projects, such as Google Art, should be used, to find the most appealing way for delivering data to the end user. The abundance of resources is a major factor along with the ability to filter large amounts of information which are both important success factors for any database. Intuitive search and efficient filtering of data will enormously advance the use of Europeana.

Executive Conclusions and Recommendations

The Polish National Tourist Board has provided valuable insights for the future development of Europeana. If these are taken into account, there is a great potential of establishing closer cooperation between Europeana and national tourism boards throughout Europe. The key points to be considered for further development are:

- **Building partnerships on a national level between culture and tourism institutions**
- **Raising awareness through linking culture and tourism on a European level**
- **Focus on the customer perspective**
- **Find unique selling points**
- **Identify the niche**
- **Improve user interface and filtering mechanisms**

Prioritising these key issues will help to reach out and establish steady partnerships with national tourism boards and improve the visibility of Europeana. These are the necessary steps that need to be taken aiming to increase the re-use of Europeana resources in tourism and creating sustainable partnerships with National Tourism Boards.

Chapter 1.3.2 Enterprise Estonia, Estonian Tourism Board

Consultation with Shardee Rebas (Digital Marketing Coordinator)

Estonia is one of the top contributors of data for Europeana, so exploring how active the cultural sector is communicating with the tourism industry is interesting. The Estonian Tourism Board markets the country to tourists as being well advanced in technology, so cultural activities are promoted through experiences using modern devices.

There are numerous pilot projects in Estonia that have been using Europeana content resources, one of them being Google Field trip, the major pilot project on entering the tourism industry while

re-using Europeana content. However, the awareness and visibility of Europeana within the tourism industry in Estonia is not sufficient and talking about the potential is more theoretical, as there has not been much cooperation or visibility until now.

Speaking to a representative of the Estonian tourism board provided insights into Europeana and three areas of focus were suggested as part of the consultation. If these are considered and addressed, it could increase the efficiency of the industry's re-use of the content.

Quality and the scope of the content

The website dedicated to destination promotion is very limited with regards to the content it has with a clear focus on providing content that has high relevance for tourists. The DMO developing the website has to be aware that large amounts of content are counterproductive than not providing sufficient content. There is no need to turn an official tourism website into Wikipedia. This is the main obstacle from a destination point of view that limits the possibility to use more content directly but it can still work as a source of inspiration. The search of ideas is inevitable when running specific campaigns.

Currently, Europeana is an enormous source of information, but a search on the platform is not efficient enough. It can be very hard to find information that potentially is advantageous from the user perspective. Typing specific keywords does not necessarily deliver the desired results: there is too much content in the results and it is clearly not useful or relevant based on the used keywords. The biggest issue with the database is the quantity of data that is hard to filter and it is taking too much time to find consistent information. Making the search more intuitive and filtering it will make a significant difference for the use by destination marketers.

Partnerships on national level

Europeana is a large network organisation of many cultural institutions. The first step towards more efficiency could be the initiative from Europeana to delegate the communication to its partner institutions, to engage with the tourism industry on a national level. For instance, cultural institutions and tourism boards could organise a workshop together, so they can exchange the views on how cultural institutions select content to upload on Europeana and tourism boards can explain how they promote culture. Working together means providing information for NTOs about new things coming up and exchanging ideas on how to develop it together.

There is a demand to cooperate with the cultural sector although cultural institutions are hesitant. For instance, tourism has no knowledge about the development of Google Field trip. Currently, cultural content that is used by NTOs comes directly from the organisation and NTOs being aware of individual pieces of content then contacting the museum or gallery. There are clear issue with that which is the lack of cooperation and lack of efficiency as for now it is done on a case by case basis and interesting information is not used for tourism promotion very often because of low awareness about it.

Mostly it is the NTO that approaches cultural institutions and talks about new ways to attract more visitors. NTOs are the ones who bring more visibility and promotion for cultural institutions through organising press trips and cooperation could also lead to better results. Europeana should inspire partnerships on a national level and the exchange of information about Europeana content. This will ensure a successful development towards the re-use of cultural content in destination marketing.

Structuring, filtering and flagging the content

Many improvements from a tourism promotion point of view have to be done when it comes to Europeana content concerning structuring, filtering and flagging content to make it useful for destinations. As an example, there should be a different filtering approach: having identified that Europeana has a wealth of historical content, it needs to be adjusted and filtered differently. For Estonia as an NTO, historical content should relate to certain periods that are attractive for

particular target markets, labeled by different periods: Russian times, Swedish times, Danish times. This could make it easier for someone from a target market which is interested in particular content to explore.

Content has to be presented in a way that is appealing to the user and it is important to find something relevant and suitable relating to the keyword used during a search. It is also important to consider who is adding data to Europeana and ensure that a new tag specifically for tourism is used if possible to highlight pre-approved content that can be utilised in a tourism context. This can make the work of tourist boards with Europeana and its database easier, more efficient and will also enable a greater re-use of content in tourism.

Executive Conclusions and Recommendations

The Estonian tourism board sees a potential in working with the cultural content in general as well as looking specifically into the vast resources of the database. Several improvements could move the project forward and inspire the re-use in tourism:

- **Improve search quality**
- **Filter and limit the scope of the content**
- **Form partnerships on a national level**
- **Establish structuring, filtering and flagging the content**

Working on these issues will help the cooperation and ensure an efficient way forward for the re-use in the tourism business.

Chapter 1.3.3 Lithuanian National Tourism Board, State Department of Tourism

Consultation with Irma Mickuviene (Digital Marketing Manager)

The Lithuanian State Department of Tourism is the National Tourism Organisation, promoting inbound tourism in foreign markets. The overall marketing strategy is focused on culture as one of the important tourism contributors, with cultural tourism as one of the key reasons to visit the destination. Cultural institutions are active in aggregating cultural heritage resources and there are quite a few datasets developed for Lithuanian themes, such as Lithuanian Art, Lithuanian photos or postcards from Lithuania.

The below consultation is looking to capture the insights on the possibilities to adapt Europeana content for the re-use by tourism business from the perspective of the national tourist board. The overall impression coming out from the consultation is that Europeana is not ready to offer valuable input for the tourism industry, but a few improvements can change this. There are a few important issues that need to be addressed before approaching the tourism industry:

The landing page

It is important to make a quick and good impression when visiting a website, as the selection of websites available is big and the majority of users are abandoning them. Accessing the Europeana database is slightly disappointing: there is no logic on the landing page and no clear indication of what should be done. There are plenty of links, but the user is not guided thoroughly and it is not intuitive enough to have a smooth user experience.

Further to that, the functionality of the site is also an issue and comparing this with similar projects such as Google Art, it is not colourful and attractive nor does it have relevant information for visiting the cultural establishments. However, Pinterest boards are effective, as the content is appealing but there is not much use of promotion. Once you are linked to the database, you are

not making use of it. Focusing on the development of the user interface should be the priority, followed by effective marketing on social media.

It clearly has a lot of potential, but as long as it is not useful for the potential audience, tourism professionals, creatives or tourists, it is not likely to inspire any re-use or integration in their marketing campaigns.

Appealing content

The content within the database is not inspiring and even if a user finds a piece that is potentially interesting, there is often only a low-quality image with a lot of textual information. To make content appealing some work on the content needs to be done, but as tourist boards are not experts on particular cultural content, they are not able to develop it efficiently. Tourism needs content that is ready to use, therefore, it is the discretion of the cultural institution to know what is appealing to users.

Museum enthusiasts

Europeana content has a potential to engage tourists who are interested in culture, but it is not a big fraction of the general public. There should be a clear understanding that adapting content for tourism purposes is just a niche industry and it will only be relevant for a very specific group of people such as museum and art lovers. It is important to consider and define the target audience, as not everybody, who travels, is an art or museum enthusiast and the biggest marketing efforts are directed towards wider audiences.

Engage in storytelling

Storytelling in marketing has been trending for a long time and Europeana is an excellent source of inspiration. Visiting a museum or art gallery, the experience always depends on whether the story told is engaging and whether it relates personally to the audience. Online resources are not different: the story that is told about an object, the place or the historical event has to capture the attention of the users and take them through the experience. Europeana should use their content and create stories which will lead to the closer cooperation with the tourism industry.

Create virtual tours

When exploring Europeana content, one of the potential ways to reach an audience and engage the tourism industry is in the creation of virtual tours. The online experience of virtual tours could inspire travellers to go further and visit the place, so the virtual tours have a potential to open up the most interesting pieces and influence the conversations that people have about cultural attractions. Virtual tours is one of the ways for museums to highlight the local content. Such products are attractive for the tourist boards to use in the promotion of the destination. This could lead to cooperation and bring more visitors to the cultural institutions, as it is marketed to a wider audience.

Executive Conclusions and Recommendations

The Europeana database currently is not very appealing and there is a low probability that it will inspire tourism industry professionals to use its content. However, following the recommendations and bringing together cultural institutions and tourism authorities for a conversation there is a great potential to make the most of the extensive content of European cultural heritage. The highlights of the consultation can be summarised below:

- **Improve the technical side and develop towards a more user-friendly product**
- **Provide appealing content leading to the further exploration**
- **Consider that museum enthusiasts is a small niche**
- **Tell the stories that are engaging and inspiring**
- **Create virtual tours to inspire the visitors**

The potential of Europeana will live to its fullest once the improvements mentioned as part of the consultation are made. Further steps of raising awareness and increasing visibility should follow, but it is important to have ready to use the products for promotion.

Chapter 1.3.4 Innovation Norway

Consultation with Hans Petter Aalmo (Head of Web & Mobile)

Visit Norway is one of the leading destinations in tourism marketing as well as a main contributor for the Europeana database. Focusing on nature when promoting the destination, the Norwegian national tourism organisation is also considering diversifying the themes used for promotion.

There is a rising demand for cultural content in tourism, so Europeana has a high potential. Currently, there are a few issues that need to be addressed before taking it further to the tourism industry.

Fixing functionality

The most important area to address, is making changes to the user interface: the first impression is up to a standard of the user. The first impression of the title page is that Pinterest content has the central focus and it takes the attention away from the database. Focus on the visibility of the database on Pinterest is important, but it should not distract the user from the principal goal, which is exploring the database.

The biggest difficulty is to find relevant content: there is no moderation and search results are overwhelming in numbers. Once the user puts in keywords for a search, it returns a mixture of information. There is no filtering on the relevance and the impression is that all items are mashed together despite their level of importance. From a destination perspective it is not convenient to use: if the search term is 'Oslo', there are so many irrelevant documents in French, that the marketer can easily get lost and abandoning the database before seeing the value of it.

It is advisable for Europeana to define its focus and target audience: professional academic researchers might be satisfied with the status quo, however, for tourism marketers it needs to be a more user-friendly environment to actually engage and work with it.

Content Relevancy

At this time present, the relevance of content does not meet the expectations of the tourism industry. Content has to be flagged or highlighted in a certain way to be more visible because the abundance of content is not inspiring nor practical. This is the reason tourism should use the content in theory, but in reality, it is not very likely to happen. Datasets should be developed to adapt the content to tourism needs and the filtering should be done through clearly established criteria.

Find themes that are interesting

The best way to approach the tourism industry with data that is relevant is to discover the themes that are in compliance with tourist needs. Themes should be established for every destination separately and tourism experts should be involved in the selection process. For instance, historical content that is interesting for Norway is the Vikings theme. It could be interesting for other Nordic countries to get the content in and build an active campaign re-using Europeana content. Even though at the moment, the search does not return any results of relevance, deeper data mining should be done by Europeana.

For a long time, nature was the main highlight in the tourism promotion in Norway, but there is an increasing demand for cultural experiences. Considering that culture, in general, has a very broad definition, it is important to choose the most inspiring parts of it that will impact on tourists.

Tourism marketers prioritise on themes that attract the widest and the wealthiest audiences. These are the criteria Europeana should consider while pulling the themed datasets together. In the case of Norway, the bestselling topics in culture have always been the Vikings, Polar Explorers and Churches. Working with the Arts Council in Norway on compiling architecture related content should be well received by users and interest tourism marketers.

Channels of distribution

Once the database is ready to use and it has the information sorted out in a particular order, further steps to raise awareness of it should be taken. The information should be packaged in an attractive way, so the tourism boards will get interested, over the large amount of content they get. An introduction to national tourist boards could be made through the European Travel Commission. Next stages could be issuing newsletters addressed to the travel industry specifically, and then gradually spreading the news through different conferences and workshops, where people can familiarise and engage with the resources.

Synergy between culture and tourism

Synergies between cultural and tourism promoting institutions should be established to maximise the results. Currently, very few tourism boards are working closely with cultural institutions for several reasons. Tourism boards are organising campaigns financed by their partners, while cultural establishments are rarely joining these. They do not have a significant budget and they do not share the interest to target foreign audiences. The cultural content usually comes from accessing the databases of the organisations managing events. There is a lot of potential in working together, but practically it is not easy to implement.

Executive Conclusions and Recommendations

There are a few indications in the tourism industry for culture to be more important in tourism marketing. However, Europeana at the present time is not ready to meet these needs and improvements are needed to get closer. If the above key findings are dealt with successfully, this could lead to closer cooperation with tourism:

- **Work on fixing the functionality**
- **Concentrate on the relevance of the content**
- **Find the most relevant themes for tourism**
- **Identify the best distribution channels**
- **Focus on potential synergies between culture and tourism**

The potential of Europeana is possible only after the improvements mentioned in the consultation are made. The approach should be gradual and considerate of the trends and demands in the tourism industry.

Chapter 1.4 City Tourism Boards

Chapter 1.4.1 Visit Ljubljana

Consultation with Uroš Črnigoj (Head of Digital Marketing Department)

Ljubljana as one of the leading destinations in digital was chosen to explore deeper the potential of re-using Europeana through partnerships with city tourism boards. The perspective of cities is an important insight for Europeana looking to establish a sustainable partnership in the tourism industry. Ljubljana city tourism board is an experienced destination, as they have been working with cultural institutions on many occasions, the most successful being the development of the Ljubljana City Card.

Insights of Uroš Črnigoj, Head of the digital market department in Visit Ljubljana have outlined a few key points that have to be considered by Europeana seeking to establish itself in the tourism industry.

Data relevance

The importance of data within Europeana is the first issue that must be assessed before exploring the possibility to distribute it to the tourism industry. Currently, the knowledge of Europeana has not reached city boards, but first data should be filtered based on the relevance from cities' perspective. It is important to consider, that when city board upload content to their website or create an app, they use only a few pictures, while big files, such as videos of TV shows are not interesting for Cities due to their file size and its length.

Europeana as the database should go through individual steps: first assess the relevance of data it possesses, then the availability to recreate from larger files and make use of parts of it, after that approach tourism boards. This is the only way to bring Europeana content to city boards. For Europeana, it is advised to establish the filtering of resources that are potentially relevant for city promotion or has any influence on visitors' behaviour before approaching city tourism boards.

Focus on selling

Europeana has to consider, that city tourist boards are focused on selling their destination and every activity they make, is based on the consideration of whether it generates income. The current Europeana content or developed products, such as Europeana Beacons are not appealing for cities because it is not clear whether they can capitalise on that. There should be a clear way to increase sales value, and then it is interesting for cities. It is also possible to recreate Europeana content and make it an exclusive offer: the one that has limited availability through city tourism board, could work for a city.

Projects such as Europeana Beacons are interesting and innovative, but it is not clear how it can have added value for the city. Especially for small destinations such as Ljubljana, the inspiration to travel is not appealing, as there is a much greater demand to sell the city for a higher price and be more exclusive, so it increases the value of the tourism product. Additional content is great to have, but it depends merely on how to use it: it is only useful when it inspires people to take action. For example, from the city tourism board perspective, there is no use for exhibitions online, because the value is only created if a person visits and pays for the ticket, only then the local economy grows and benefits. Cities are looking for unique solutions only if they are increasing the city's revenue by offering new products. This is the approach Europeana has to take into consideration when approaching city tourism boards.

Closer cooperation between culture and tourism

There are opportunities at different levels of tourism boards and cultural institutions working together. There is cooperation, in different areas: tourism boards work with museums and galleries to get content and tourism boards provide advice for institutions on what is appealing for the tourist in the institution, but it is not always easy to establish a fruitful cooperation. Cultural institutions should work closer with tourism boards.

One of the ways this cooperation could work is tourism taking up the role in educating cultural institutions on a very local level and cultural institutions should provide the expert advice on content they have within the institution for tourism boards. This cooperation should not be considered as invasive: tourism is not aiming to overtake museums or other cultural institutions. The agreement should be based on the synergy between two sectors: cultural institutions know more about products they create and tourism boards could push these to the end user, the tourist.

An excellent example of cooperation between cultural institutions and a tourism board is the Ljubljana card: museums were convinced to work together with the Ljubljana city board and the

tourist receives reduced entry to places in the city. It contributes to both industries and the tourist also gets a clear benefit. Cultural institutions get the benefit of increased numbers of tourists and city tourism boards get access to the attractions that are entertaining visitors. This is the approach that should be taken and highlighted thoroughly and Europeana is a great platform for that.

Target domestic tourism

Europeana, in general, is something that is attractive exclusively for domestic tourists: they usually are the ones that are willing to explore culture deeper and Europeana is a perfect resource. The language of the content in the database is closely tied to its location, in this case, it is in Slovenian language, this is one more reason it is useful for local visitors and it limits the options for foreign visitors. Having that in mind, it could benefit the destination more that are more focused on domestic tourism. Currently, Ljubljana gets 90% of foreign visitors, so content that is available in the local language is less appealing for the city tourism board. While Europeana is a comprehensive resource for local visitors, allowing to explore the area in greater detail, is more attractive for destinations that target primarily domestic tourists.

Product development

There are many great examples of how Europeana can be used in different applications which the tourism industry could profit from. There are great aspirations in Europeana to inspire the tourism industry to pick up content for the end-user for product development. The consultation with Ljubljana resulted in clear conclusions that cultural institutions should be the owners of content and focus on product development themselves. Targeting this problem might be complicated because institutions are not ready to develop products, just because the content is available already. They are more likely to assist and advise cultural institutions, who should be re-using their own content in product development. The aim of Europeana could bring museums and cities into closer cooperation with a mutual goal - to develop products for the end-user, as it an objective in both sectors.

Executive Conclusions and Recommendations

The work that has been done so far to collect data and now Europeana's future potential is in building relationships with the tourism industry. Building on the above feedback, the steps forward working with city tourism boards require to address the following:

- **Choose relevant data before approaching city tourism boards**
- **Focus on selling**
- **Work on closer cooperation between culture and tourism**
- **Target destinations who prioritise domestic tourism**
- **Improve the skills of product development in culture institutions**

Prioritising these points could move Europeana closer to the initiatives that could also become a part of city tourism boards marketing agenda and also ensure that Europeana is better placed to be more effective in its approach.

Chapter 1.4.2 Vienna Tourism Board

Consultation with Andrea Kostner (Deputy Team leader in Content Management and Production)

Vienna is one of the most highlighted cultural destinations in Europe and exploring Europeana potential with a city tourism board is essential for this industry consultation. Moreover, Vienna is the destination that has successfully worked with the pilot project Google Field Trip even though it was the National Library of Austria and the Tourism Board itself has no knowledge about its relationship with Europeana.

The Interview with Vienna Tourism Board brought up some important issues that are necessary to consider when working with Europeana and defining the steps forward towards increasing visibility and seeing the value of the digitalised cultural heritage.

Quality and search engine

Accessing the Europeana database for the first time, one thing that stands out negatively is that the quality of search is not user-friendly: it is not easy to find desired content using just keywords. This issue needs to be solved before moving to the promotion in the tourism industry, as determining the quality as it is now will not appeal to the potential users.

The choice of online resources increases the requirements for content quality and only an easy to use and an intuitive search will make the database appealing. Technical improvements are necessary because the current search is not efficient. As it is difficult to find good results, looking for content related to cultural heritage or other historical themes, it is easier to go directly to cultural institutions, where these can assist with the selection of content. For Europeana to be the database of choice, technical improvements need to be done, starting with search engine refinement and moving towards the selection of content.

Visibility in tourism

There is no knowledge of Europeana within tourism industry and even in the projects that are showcased as examples, there is no reference to Europeana. For instance, the plan that was developed with the National Library is known as a project collaboration with Google, but it has no indication of how it is useful for tourism or that Europeana data was re-used. This means that even working on outstanding products; Europeana is not consistent with the promotion of its brand and that prevents the message to get through to tourism.

It is important for tourism to find out about the availability of Europeana because there are certain promotional campaigns, that could potentially tap into these resources. It is not the whole entirety of the promotion where the data available on Europeana is useful, but occasionally there are special campaigns. For example, Vienna tourism had a campaign in 2015 for the anniversary of the Ringstrasse (famous historical boulevard in Vienna). There were old pictures selected to recreate how the Ringstrasse looked 150 years ago and it being put together with the photos of the same places today. Small videos were created from the Ringstrasse and Vienna Tourist Board created similar scenes now. People were arranged the same way, in the same location, the only difference between them was the time. This was a promotional campaign used to promote Vienna tourism in the US. Europeana could have been the perfect aid gathering the content, but Vienna Tourism Board worked directly with the National Library as they had no knowledge of the other options.

Vienna tourism board has a close relationship with the National Library and their established working relationship is a good practise example Europeana should aim to become. The way in which the Ringstrasse campaign was organised was a collaboration: tourism professional knew they wanted to show the Opera, the Parliament and other buildings, that are on the Ringstrasse, so they addressed the National Library directly to find out what they have that might be used for a campaign. There is a potential for Europeana to be of service in promotional campaigns the tourism boards organise, but they should be aware of the availability of the resource first.

CTO focus on special occasion or campaigns

Tourism boards work with cultural and historical content, but it is not their primary focus. Looking for the potential of Europeana to discover its place in the city promotion on special anniversaries. Special occasions that have historical context are attractive for tourism. One of the examples is the Ringstrasse campaign, another example is from three years ago when Gustav Klimt, the painter, had a significant anniversary, where old pictures were used to tell his story. Europeana should consider compiling content for these special occasions and make them available for tourism promoting organisations in a dataset.

Special occasion destination-related data is not only useful in advertising campaigns but they can also be used for B2B events where destinations try to engage with the tourism industry. The content comes directly from cultural institutions as they work together closely with cultural institutions. Vienna tourism board generate ideas what they need and cultural institutions provide what they have. Currently, there is no incentive to change that pattern of cooperation and look for the content on Europeana. It is too hard to find what is needed there: it is too big, has too much data and the search function should be improved. It is not possible to type in specific names and get the results that provide to use content.

Tourism should work with cultural institutions more and know who to talk to: it is going beyond digitalised material all the time - the main job is to show how the destination looks now and get people interested. Sometimes there is a need for some old materials to highlight certain events and that is where working together with the cultural institutions are inevitable.

Reliable channels

There are so many tourist boards that are developing campaigns and might make use of digitalised cultural resources. When it comes to images and videos, which are appealing for tourists it is important to identify reliable channels to get the Europeana information through. It is worth considering addressing people, not just digital marketing professionals, who organise various campaigns as this type of content might be interesting. The best way to reach them is to go to events or workshop, also, distribute information about opportunities within the organisations directly.

The communication of Europeana should focus on participating in events that get destinations together: events such as the Digital Tourism Innovation Campus in Barcelona. Other events that are relevant are the annual conference on Cultural Heritage and New Technologies in Vienna in November, where participants talk about archaeology and digitalisation. As the content presented there is closely related to Europeana distribution and the people attending, these conferences are the target audience. It is also useful to consider working with the organisations such as European Cities Marketing, as it is potentially a real channel. Through those it is possible to introduce Europeana to the people who actually can make use of it. There are many destinations in these events so it could be a good idea to talk about the availability of these resources online as well.

Copyrights

Considering the re-use of content available on Europeana, copyrights might be an issue: there is no clear policy on how to use the pictures, as it has different filtering options for it. It should be refined to just one indication: using the Creative Commons or another data labelling system. It is not necessary for a user; it just has to be clear information about the copyrights policy. This does not necessarily prevent destinations from using data if there is a payment, except it must be easy to proceed and use a reliable system. Looking into the possibilities to use Europeana data, there must be more clarity on the copyright policy.

Executive Conclusions and Recommendations

Vienna tourism board is using cultural heritage content in some of the promotional campaigns, but they have been working with the cultural institutions directly as they have no awareness of Europeana. There is clearly a potential to start working on the content search on the database, but to make it appealing certain improvements must be made. These are summarised in the points below:

- **Improve the quality of search**
- **Increase visibility in the tourism industry**
- **Consider that CTO are the most likely to use the cultural heritage related data on the campaigns designed for special occasion**
- **Identify reliable sources**
- **Clarify copyright policy**

Chapter 1.5 Tourism and Technology Businesses

Chapter 1.5.1 7 Scenes

Consultation with Ilse Rombouts (Creative Director) and Erik Mertz (CEO)

Through the process of tourism industry consultation, we have recently approached 7scenes, as they are a company delivering cultural tourism content to the end user via innovative solutions. The company has the ambition to work with Europeana content, making it available through technological platforms they have already developed. 7scenes has worked on numerous online projects, focusing on a mobile-first approach, influenced by prevailing market trends. Consumers are using apps on their phones to find cultural landmarks, to explore cities, to learn more during exhibitions, and to share experiences. Smartphones offer new opportunities to experience cultural heritage - stories and collections hosted by cultural institutions can now be made visible in new ways, beyond the exhibition space of a museum and out on the streets.

7scenes has created an access point for platforms that have been specifically designed for museums, archives and cultural institutions, which enables the company to create independently and publish interactive heritage tours for smartphones. 7scenes is also offering a solution for cities seeking to set up collaborations between multiple museums and archives, which could particularly be an inspiration for Europeana; the organisation of a few thousand cultural establishments coming together. Among the other things created by 7scenes is an excellent example of re-use of digitalised museum resources, the 'Museum-app', which is being used by Dutch heritage institutions. This platform bundles all mobile tours from Dutch museums and archives in one app and has been used for creating thematic routes.

The cultural tourism experts in digital 7scenes see great potential for Europeana to be re-used in tourism, once current challenges have been successfully addressed. The key points discussed below are useful insights for Europeana Network in seeking to establish itself as a content provider for the tourism industry.

Synergies between technology companies and cultural institutions

Europeana has developed an extensive raft of content, and the company has huge potential that has not been fully tapped into yet. The database that Europeana has developed is currently too complicated for existing users, and the landing page is appealing neither for the tourism industry nor the individual tourist. As a curator of content, the site should work towards finding the synergies between cultural institutions and technology companies to establish partnerships and develop appealing products for the end-user.

Cultural institutions should be able to select the most relevant content manually, but the solutions could also be provided by partners in the technology sector. The platform itself should be made easier to use - different organisations could be allowed access in order to customise their resources that will be selected to be pushed through for the end user. There are various different ways to approach this aim, but finding a balance between the vast database that has a very academic-style interface, and the demands of the contemporary user, who is likely overwhelmed with the quantity of information online, is a necessary step.

Creative solutions

There are different possibilities for Europeana to establish itself within the tourism industry and inspire the continual reuse of its products in tourism. Information overflow and developed consumer taste require a creative approach while also developing new products for the end-user.

Inspiring examples of Europeana content reuse are expected to be creative and follow the latest trends. The first intention of the content is to link the location of the user to the pieces of content in Europeana. Creating unique tours is an appealing solution for the user, and thus, this should be made easier to use. Secondly, there is great potential for Europeana content reuse with regard to creating products related to augmented reality. As an example, while visiting a castle, it could be made possible for a user to witness another layer of images related to how the same castle looked in the XVII century. Augmented reality could also be used to show the 'hidden resources' of the museum, and saving them at the same time. Creative solutions responding to the trends of tourism industry concerning the re-usage of Europeana content should be carefully considered and implemented gradually, by steadily developing and creating new products.

Addressing multilingualism

The variety of the data providers producing content for Europeana in different languages is an obstacle with regard to trying to create a universal product for visitors while also taking different backgrounds into consideration. However, different solutions could efficiently solve the issue of multilingualism. One of these is synchronising the content data by choosing any of the popular automated translation software suites. There is concern about this solution, as the quality of translation provided is not always of the requisite standard. Another approach to addressing this problem could be the introduction of technology that can translate during tours by using the pieces of content from different countries in different languages and putting a layer of translation in the language preferred by the tourist. However, it is important to emphasise that translation of the selected objects should be carried out by the institutions providing the content to ensure the quality of the text.

There are also some possibilities with regard to addressing the problem of multilingualism through innovative solutions, such as connecting the translation with the location while still leaving the possibility for the user to choose an appropriate language. Addressing multilingualism through innovative solutions ensures that the content in different languages is more appealing for the tourist, as it offers a unique experience and user-friendly solution.

Personalised experience

Creating personalised experiences provides a competitive advantage for any cultural institution, and it is the approach that should be applied in organising Europeana content. The institutions within Europeana - or the curator of the Europeana Network content - should focus on filtering and selecting data that is the most appealing for their target users. Tourism industry players are increasingly focusing on enabling tourists to personalise services and experiences by providing them with the opportunity to change settings, adapting content to their personal preferences, and determining information for their specific needs. Technology is ready to contribute to the unique experience for the visitor, be it specially designed tours, or the services responding to specific needs of the traveller. This approach simply allows the product to stand out to consumers. Currently, Europeana is struggling to address individual users, but the extensive amount of content it has already curated has the potential to serve everyone's needs if filtered properly. This requires an evolution of its approach from the *status quo* of a huge database that doesn't offer anything special.

Measure the results

Cultural institutions acting as data providers for Europeana could benefit directly from the efficient re-usage of Europeana data in tourism. But introducing new solutions should focus more on measuring results and assessing data to address with the overarching ethos of ultimately addressing visitor needs. Currently, data on the effect of new technology introduced within museums is scarce. The cultural organisations are quite superstitious when it comes to measuring outcomes and they don't concern themselves with the impact that certain products offered inside the organisations have for users.

They are resistant to working on communication plans or KPI's, so they don't know the real impact of their work on customers and the general public, which prevents them from moving forward with regard to the aim of responding to the needs of visitors more efficiently. The cultural institutions have so much information held in the resources of the institution, but insufficient data related to what tourists and visitors do there. It is important to identify patterns of visitor behaviour in to adapt and evolve accordingly. Creative solutions for measuring these patterns must be implemented, such as the use of beacons for tracking tourists in the museum, and monitoring they are doing. This will provide data that can be considered essential for identifying demands, and ultimately understanding visitors better.

Executive Conclusions and Recommendations

The consultation with 7scenes resulted in a list of valuable insights for Europeana. Moreover, the interview with 7scenes unlocks the potential of Europeana content reuse for tourism, if the aforementioned issues are addressed with the right approach. In order to move forward appropriately, the recommendations below should be considered carefully:

- **Look for the synergies between cultural institutions and technology companies;**
- **Seek creative solutions delivering content for the end-user;**
- **Address multilingualism through innovative solutions;**
- **Focus on creating a personalised experience;**
- **Measure results using modern tools;**
- **Understand the needs of users.**

Addressing the issues above and working towards recommended goals could lead to an enriched visitor experience, and would thus be more appealing for the tourism industry. It is expected that the products developed as a result would be attractive for tourists and would inspire further development.

Chapter 1.5.2 The ArtStack

Consultation with Ezra Konwitz, Co-Founder of the ArtStack

ArtStack has been addressed as a part of Europeana industry consultation because this social platform is dedicated to art lovers and it is interesting to carry out case study as a part the research. The co-founder Ezra Konwitz and her team has created a very appealing product for art lovers, and has also worked as Europeana Professional. This conversation highlights the most important steps for successful development of Europeana, in order to make it more accessible for the tourism industry, and other important related issues.

The main goal of the ArtStack is to search and share pieces of art. It is a unique platform that originally launched in late 2011, and currently has a few hundred thousand followers. It has become one of the biggest communities for art lovers. Immediately after its launch, ArtStack was described in the press as "the version of Pinterest and Instagram for art lovers". But it has benefits beyond these well-known social media platforms, in that it is not based around consumerism or commercialism, and limits the community to those who share passion for art in one form or another. ArtStack allows users to collect, 'stack' and share their passion with other art lovers online, and is a highly addictive way to discover new art and artists.

ArtStack is the first social platform for art in the world, creating a democratic way for people to engage with art and curate their own space online. Artists, auction houses and galleries use ArtStack to help their work directly reach out to the most relevant audience; ie. people who have already expressed an interest in what they're doing. This means people can learn about and once

discover their works online, and this means that they are much more likely to attend art exhibitions and enjoy art.

Studies have shown that people who see art online are much more likely to engage with it in person. ArtStack has an ambition to encourage engagement with art, and a specific section of the ArtStack website has been created in order to enable surfers to see what exhibitions are currently taking place. The ArtStack site has information on hundreds of cities globally, and provides art enthusiasts with an excellent idea of whether someone would be interested in based on the artists' work.

The consultation with ArtStack provides insights for Europeana on a few issues, including how to convey messages to a wider audience, and how to establish itself in the tourism industry. Certain key points, outlined below, must be taken into consideration in order to for Europeana to expand its operation.

Quality and accessibility

Experience with Europeana for ArtStack has enabled quality to be identified as one of the major obstacles preventing success in raising awareness and being useful to fans of art. Europeana has been focused on collecting a sufficient amount of data and making this available for different industries, but it has been established that the present day is a turning point, and from hereon in quality should be the primary focus. The number of pieces collected since the project started, and the number of institutions who are already committed to providing data, are sufficient in order for the website to be a credible source, but it essential that Europeana Network establishes higher standards for the quality of data provided. This could be achieved by analysing the issues raised by different industries and setting clear guidelines for contributing members.

Europeana's potential to become more appealing for different industries is based on three pillars - firstly, the sufficient amount of content, secondly the outstanding quality of content, and finally awareness of availability.

Having successfully implemented the first step, Europeana should work going forward on improving the quality of content, and only once that has been improved, moving on to raising awareness.

Technical issues

Having consulted ArtStack, we are able to point out a few technical issues that are preventing different industries - tourism in particular - from reusing Europeana content for their own needs. As an example, the initiative of ArtStack to incorporate Europeana content has not been successful. This has met with two big obstacles - the quality of the content was not sufficient, as the images provided by the platform are not high resolution, and the other issue was the lengthy procedures involved in getting access to the content.

It is very likely these are hurdles also faced by other potential users as well. It is particularly strongly advised to tackle the first problem of the content quality, as mentioned in the previous paragraph, by tightening up the requirement for contributors to the meta-base, especially by focusing on the needs of the potential re-users.

The length of the procedures in decision-making is probably the result of the origin of the organisation: big number of contributors are complicated to coordinate. And within the organisation, amid a variety of cultural backgrounds it is not always fast to find a fruitful dialog. Optimising the procedures for third-parties is a necessity and it is strongly advised to approach this from the perspective of users. Once these technicalities have been successfully dealt with, Europeana will certainly become more appealing to the tourism industry.

User experience

Europeana has made a huge move from being just a digital library to becoming suitable for broader audiences. However, working with wider audiences requires a deeper consideration of user experience.

The core element of user experience is the value a particular website provides for the user, and assessing Europeana's landing page it is noticeable that there is a deficit of certain elements. It is not clear to the end-user how database resources might be useful, the layout is neither appealing nor user-friendly, and it is difficult to find the website via search engines.

It is essential for these issues to be addressed by improving the website layout and working on find-ability via search engines as core elements for improving the user experience. Meaningful changes toward a more visually acceptable landing page in the Europeana database should also be considered significantly important for user experience.

User-generated content

Europeana should carefully consider building relationships with users and identifying communities that are generally interested in the content. The integration of the social media is a good start in this overarching aim, but being able to interact with users will help solve the other issues, visibility being one of the most obvious.

ArtStack could be considered as a best practise case; it is a social platform that is built around user-generated content, and this provides them with flexibility. They are able to provide the user with very relevant and fresh information on exhibitions that emanates from two sources - one is from user-generated content, and the other engaging partner organisations that have access and are able to provide content directly for the platform. This is an ideal opportunity to acquire the latest information, and this is crucial in providing information for tourists as well.

The other advantage of being focused on user-generated content, is the re-usage of ArtStack content. This makes the reuse more flexible, as not owning the content diminishes the risk of intellectual property infringements. Easier reuse policy makes the process more appealing for third-parties, such as tourism organisations, to pick up and utilise the content for their own benefit.

Revenue focus

However, to achieve a better adoption and reuse of Europeana there needs to be a change in focus to creating awareness among the community of developers interested in art. This is not the easiest task to achieve because online art is not a sector that generates revenue easily. There is a variety of interesting ways that Europeana content could be tweaked in order to provide new experiences, but this will not necessarily generate revenue in and of itself, and it also tends to limit the number of people who could be inspired to invest their time in these projects.

However, this should not prevent aspirations to reach out to communities. On the one hand, there are creative people out there who are not focused on revenue, but instead on creating outstanding things. And, on the other hand, there are different ways to generate money through cultural pursuits if people are willing to participate with producing them.

Executive Conclusions and Recommendations

In considering the above points which came out of this consultation, it is clear that Europeana is a very credible database and with certain improvements it could benefit not only the art lovers online, but can become appealing for the other industries, such as tourism. The key issues that need to be addressed first are as follows:

- **Improve quality of content**
- **Solve technical issues**

- **Improve user experience**
- **Explore the possibility of working with user generated content**
- **Reach out for communities which are not only revenue focused**

Prioritising these points will make the platform more appealing for wider audiences, as well as establishing the website in a position for reuse within the tourism industry.

Chapter 1.5.3 Musement

Consultation with Claudio Bellinzona (Co-Founder & Chief Operating Officer)

Musement is a start-up that dates back to 2011 and was commercially launched as a platform in 2013 March. It was started as an aggregator of museums and art exhibitions around the world, selling tickets for museums and galleries in every big touristic destination. A niche in the market at the time was identified and it remains quite vague, as Musement is still one of the few platforms, selling tickets to events on one platform by destination.

People travel to a destination and they usually want to explore attractions and attend events at a certain location. This creates a need for an aggregated platform to serve the customers through a one-stop shop, enabling to buy tickets based on the destination. It is a unique integration model in the market: connect museums and art exhibitions with the destination. There was no such option before buying a ticket for each museum or gallery required to access different sites and Musement suggested an option to aggregate tours and tourist attractions on one platform. Now it is a comprehensive product of tours, museums and exhibitions in the main destinations around the world. That goes beyond monuments, where offers are based on the passion for particular things such as sports, wine, food or entertainment. As the company works directly with cultural institutions, it is interesting to consider Musement's views on Europeana and its potential for tourists.

Content partnerships

The collection of content is one of the biggest challenges for the platforms selling cultural activities, so the role Europeana has as a potential content distributor is important. The business model of Musement relies on the content provided by cultural institutions with the objective to sell more tickets. Currently, working with cultural institutions, it is time-consuming and seen as one of the biggest challenges, with the platform growing. It might be an obstacle for further development, as the companies, organising exhibitions are changing numerous times. Otherwise, the growing number of contacts is time-consuming and not very efficient.

Ownership of content is also important. Usually the availability is not an issue: content typically comes directly from organisers with defined policies under which the content is provided on Musement. What is challenging is the scale of the operation: developed in 150 cities around the world in 40-50 different countries and 5500 activities online makes it difficult to maintain the efficient contact with all the institutions and receive all the relevant information time. Europeana's experience in the aggregation of many cultural institutions could not only be an inspiration but potentially develop towards being one representative of the members. One database or one organisation undoubtedly benefits selling culture for tourism enormously. There is a potential for Europeana to be a communication platform, serve as a platform for companies such as Musement who could use it as a medium instead of direct contact with thousands of institutions.

Focus on the events

The current content on Europeana is vast but as rich as the content is and the meta-data attached to pieces of material, is not in compliance with tourist needs. It is not enough for content to inspire people; there is a need to trigger the action for users and that is only possible if the data

responds to their needs. Primarily tourists have a need to find inspiration, looking further for the accessibility of the site and being able to plan the visit, is the path they are following. Having the practical information tied up to the inspirational pieces such as opening times, ticket prices, etc., could be a tremendous movement forward for Europeana, looking to go further in the tourism Europeana must align itself with the needs of travellers.

Europeana has all the means to do that: currently being a well-established and known network of the cultural institutions across Europe, it can take the database further. Developing access to data in an updated manner, including relevant information for users and establishing working partnerships with companies selling the cultural events for the end user. Europeana could become a stronger institution bringing together partners and serving as a middleman between sellers and cultural institutions.

User behaviour

Aiming to reach target audiences - be it tourists or culture lovers - user behaviour thorough analysis is key. As a provider of cultural products for visitors, Musement tailors the offer based on interest in the potential client. This is the result of analysis of people's behaviour: it seems the most efficient to target users on their search based on the approach that user browses and searches based on the interests. Identifying the profile based on interests increases reach and triggers sales.

To identify people's interest, it is important to determine the elements that they are passionate about. Selling items a customer is passionate about is key: most of the purchase decisions in this sector are based on the emotions. Musement has successfully tested that, witnessing rapidly growing sales of activities related to their enthusiasm: i.e. participate in the *Tour de France* with a VIP package.

The digitalisation of culture changes the way people perceive it, but to identify it deeper studies need to be carried out. Running a culture focused site, there are some observations that can be made: the typical user who is browsing and is arranging his travels online usually is not necessarily deep and profound. With a few exceptions, of well-educated users, who engage deeply with culture deeply and have the desire to increase their knowledge before doing something, but it is a small portion of the audience and that is not a typical audience. The culture selling sites have to consider the majority that is focused on the surface of the information pool.

Locals versus Tourists

There are certain behaviour patterns in selling cultural events: one of them is the hesitance of tourists to engage in cultural activities. Due to the limited time spent in a country or city and genuine interest only in landmarks, leaves culture more attractive for local people. The majority of art exhibitions are visited by locals, as it is an escape from their routine and substitute for a journey when they come to see an art exhibition or another event.

There is a lot of potential to engage travellers more in the cultural activities. People travel more and this gives them the opportunity to engage with culture on the deeper level. Although this requires clearly determined selling techniques, where an offer is based on traveller's interest and is easy to access. Even if the audience for the exhibition is mostly targeting local tourists, important selling point if sold as local experience for visitors.

Trendsetting

There are trends that influence culture sector heavily - this impacts on the behaviour of masses and it is important to align the activities with them. Knowing who sets the trends is beneficial but to define it is not easy. It depends a lot on the local attitude and local history and other things that are hard to predict. It is interesting to observe well done and academically sound art exhibition, but groups have no interest in it. The majority of culture consumers tend to look only for big names.

There are trends in the art exhibitions market that cannot be ignored: for instance now in Italy the trend is on Expressionism and before it was impressionism. The big names are always selling better than the less successful ones, even if the later could be easier for the audience. The channels to reach the people are conventional: usually the trends are set by people being the commercials, posters or the news. It is a very delicate issue that needs to be managed and here is the possibility for institutions involved in policy-making: trends can be managed better by the European Commission or even local governments, as it is certainly less likely to come from a private institution. Europeana is certainly the institution that could engage in trend-setting activities.

Executive Conclusions and Recommendations

Musement has provided valuable insights for the future development of Europeana. If these are taken into account there is a great potential for Europeana to develop further and find its place in the tourism industry, being the trigger for tourists to experience culture. The takeaways to be considered for further development:

- **Build partnerships with content distributing entities**
- **Focus on information that is useful for tourists**
- **Analyse consumer behaviour**
- **Consider difference of culture consumers: locals and tourists as different groups**
- **Determine trends and work towards influencing them**

Following the advice on content distribution and engaging with the consumers on the way that is recommended will increase the reach of Europeana content and will influence more efficient reach of the tourism industry.

Chapter 1.5.4 Expedia

Consultation with Jean-Philippe Monod (Senior Director of Government & Corporate Affairs EMEA)

Expedia, Inc. claims to be the world's largest online travel company operating various brands. The company is able to offer millions of deals from over 450 airlines, 80,000 accommodation properties, car rental services and pre-packaged holidays to the consumer in addition to the option of self-packaging for clients, including the ability to offer any service that might be needed by the traveller.

The importance of talking to one of the major travel agencies about Europeana is huge: some insights might lead to a better application of the current resources as well as all the recommendations need to be included if there is a desire for further development. Having consulted Expedia on the re-use of Europeana resulted in a few conclusions for further consideration and are explained in this document.

Potential with the Expedia group

The Expedia structure needs to be understood to identify the possible place of Europeana resources. Expedia Inc. operates various brands including expedia.com, hotels.com, hotwire.com, Trivago, Egencia, venere.com in total including 100 branded points of sale around the world. To understand easier the areas of operation of the company and to identify where Europeana could be of use, it is advised to look into Expedia's operation as a travel agent, where the target is to provide destination promotion services.

The other potential is the media services ran by Expedia that engages in raising the visibility of the sites and it leaves the accommodation services outside the scope of interest. The best way

forward in this corporation link for Europeana is the Expedia brand as it is the one, that needs more content than the other. Media services also are in a constant need of the new content resources, to be able to service the other sites.

Raising awareness

The consultation raised an issue of perception: Europeana is currently known only for those having a different background than travel. It is better communicated through the people in the European Union or cultural background. The general public or travel industry is not aware of the availability of content, therefore, cannot be active with it. Consultation with the different industries are appreciated, and it is an important starting point for distribution of the content.

From Expedia's perspective, it is interesting to find out about the possibilities to use content as awareness which is the first step forward looking into ways to use it in the activities of selling travel attractions.

Alerting the industry about the content available on Europeana through major travel service providers is also recommended as they are closely linked to the destination promotion services, work closely with tourism authorities and are able to provide innovative solutions. The information disseminated through partnerships is based on mutual trust and more likely to circulate further. Currently, one doesn't come across Europeana being a professional in Expedia, it is just possible for people who have a professional background in European affairs or in the culture sector.

Distribute content to the right people

The awareness of the content within the organisation will only be a success if it reaches the people who are capable of implementing. The people within organisations as Expedia are the designers and the people responsible for marketing, as they are the ones who could potentially get Europeana integrated with the final product provided to consumers.

It is also the skills certain people have that are important - Europeana is a great database, but it requires a creative touch to make the most of it. Choosing the audience to raise awareness about Europeana, it is crucial reaching the people that are enthusiastic about the product Europeana has to offer. The message should come from the experts within Europeana and they must be capable of communicating how Europeana content will encourage customers to book more trips.

It is also possible to create the products with Europeana content if the result can be used as an additional service to book more trips and trigger people to want to go to Europe for specific exhibitions or sites. With that in mind, Europeana experts should approach the designers, marketing and technology people, as they could advise on the practicality and also the technical side of things integrating it.

There are different ways to reach out to these people, but finding a contact point within the company is a good way forward. Someone with a previous knowledge of Europeana and throughout knowledge of the company is able to deliver prepared materials for inspiration: be it a brochure or short presentation that is potentially appealing and informative on the possibility of the easiest way to reach out.

Generate interest

Europeana as the network of people that are the best content experts can identify the information on cultural sites or things that are likely to generate consumer interest. At this moment, it is a database with no clear focus that has too much data and does not make much sense. The ones who are willing to use the database must have the special skills, time and the people to identify the most interesting elements in a city or location for Europeana. It is not likely to be attractive to the industry in that way.

There should be the link between a summarised vast amount of the information and the most appealing elements of the cultural heritage in a particular destination. This is the only way it could be turned into something attractive for tourists, and this could be appealing to tourism. For instance, if there is Stonehenge in the UK or Van Gogh in Amsterdam or Waterloo in Brussels, these are the highlight Europeana should link their content and package it in the travel industry. It could be addressed by consulting the professionals in tourism and introducing more appropriate filtering allowing to retrieve the relevant information.

Building partnerships

In every case of cross-sector collaboration, it is important to identify the key players and form the partnerships with them. There should be a team within Europeana that can identify travel related content coming in a partnership with the institution who is promoting tourism. Possible partners for Europeana is the European Travel Commission or various tourism boards.

Before approaching travel agents, it is important to find out what are the main attractions or what are the key drivers for the organisations. Once that step is made, and the information is there ready for consumers to tap into the knowledge from tourism organisations should be obtained on how to disseminate the information for the travellers.

Executive Conclusions and Recommendations

There are numerous of possibilities to reach the travel industry, but the recommendations, coming from the different experts are crucial. If the key issues are addressed in an appropriate manner as recommended above, there is a potential, but these are the summarised steps to be taken first:

- **Analyse the potential of the major industry players and their inside structures**
- **Raise awareness through the industries that need to be engaged**
- **Identify the right people for the content distribution**
- **Generate the interest of the content hitting the essential points**
- **Build strategic partnerships**

The ability to target these issues will be essential for the further success of communication of Europeana message through the tourism industry.

Chapter 1.5.5 New Mind Tell Us

Consultation with Richard Veal (Managing Director)

New Mind Tell Us is an international company, providing a complete set of tourism management, promotion and fulfilment tools with a product, business and visitor databases as its foundation. The company has a strong focus on working with the destinations and over the years has developed hundreds of the websites, apps and different digital solutions for the destinations within Europe. Over the last 12 years, the company has developed solutions for a broad range of Destination Management Organisations, working with National and Regional Tourist Boards, City Councils and Tourism Associations across the UK, Scandinavia and Spain.

Expertise in the destination activities, the top level digital tourism knowledge and deep engagement with the travel sector gives New Mind Tell Us the credibility to evaluate the potential interest of Europeana in tourism. The consultation was carried out in two stages: interviewing the Managing Director and asking the Account Managers of different destinations to look for the potential to re-use Europeana.

Looking from the creative side and being able to assess the value of rich content and identify the obstacles that are currently evident, can be summarised in the key points below. The willingness

to address them will result in a better capacity to address the tourism industry. The main conclusions are targeting two main issues - the quality of the database and insufficient knowledge of the destinations.

Limit the scope of the information

Europeana is the database of extensive resources that has numerous possibilities. However, the scope of information makes it hard to manage and works to the disadvantage, preventing it from the use. People that could be exploring the database are possibly deterred from doing so just because it is too extensive. There are too many possibilities, and there is no clear call to action, so the potential users choose not to engage. Simplifying the access and limiting the scope is possibly the key factor encouraging people to engage with the content. Restrict the scope and simplifying the concept will benefit the users if this facilitates the process of getting the ideas from the database and inspiration for a reuse.

Inspiring examples

There are a few cases that are showcased by Europeana, but they are not promoted enough nor they are very successful products for tourism. There is a need for more inspiring examples for tourism industry to start talking about the potential of Europeana. Names like Google Field trip is a good start and is an appealing example, but there should be more of that kind, and they should be promoted heavier on the platforms, known and used by tourism industry with a clear indication that Europeana was a key content provider and had an impact on the final product.

User experience

Currently, Europeana is a searchable database, that is powerful and good for the academic search, but it is not attractive to the wider audiences, including the tourism marketers. The prevailing user experience trends indicate that everything is ready for use should be understood by the man on the street. Meaning that the complexity of it prevents a lot of potential to engage creative people and move the use of resources further. Another user interface could make a significant difference and could encourage more people to look at it, that could result in a successful establishment of Europeana in the tourism industry.

Understanding the destination

Destinations are the most likely to become the distribution channels and use the potential of Europeana in a destination, but there should be an understanding of the destination to be able to target it. Currently, the destinations stress that they have enough content for marketing themselves, as they primarily focus only on the conventional highlights. This way they do not develop their marketing or increase the attractiveness of the destination. They must be constantly reminded of the importance of uniqueness and that being focused on a storytelling needs an actual engagement of going further to really stand out. This should be understood before targeting a destination and tailoring the offer for their marketing from Europeana side.

The second stage of the consultation was giving each Account Manager a task to browse Europeana for the content relevant in the destinations they are working with. It has revealed that the content reuse ideas should come from Europeana as tourism professionals are not equipped to browse efficiently. They have looked to their client base to see which of the destinations were using historical themes as a major strand of their marketing and then searched the Europeana database for additional content. In every case, the actual content found was not particularly compelling from a visitor perspective, and they did not feel that it would excite the marketing teams at the destination management organisations enough. The experts of the content should be the ones identifying, highlighting and approaching the destinations with the unique pieces of content and this could trigger the cooperation.

Find the liaison with the destination

An effective way to form a direct partnership with the destination is to establish the theme associated with it and offer Europeana's rich content on that particular topic. This shows the

value for the particular destination and engages in exploring deeper the possibilities to find more inspiration. For example, this year is the 800-year anniversary for Magna Carta and Salisbury, as a destination, is talking a lot about it. If Europeana can find some information or some pieces of data on Europeana relating to that particular theme, but unique and never showcased before, the destination will engage with it.

The destinations are excited about the unique themes, but not being experts in the cultural heritage resources they are not able to find the relevant content, nor they have enough resources to dedicate for such a search. If Europeana manages to identify the key points of interests for the destinations, they will engage with the content and use it for promotions. This also potentially creates a further effect - inspiring to look into it, but that has to start from Europeana side. The distribution channels will follow if the information is relevant and inspiring, but only the content provider can determine that and put it through to help to tell a story.

Targeting the preselected destinations

Approaching destinations is a vague term - the variety and the difference of them require large resources. The sensible way to test it is running a few pilot projects: preselect theme and destination and provide it to their marketing team. It should filter down to the content that is appealing for a particular destination or a certain group of people. The content should contribute the visitor experience or inspire the potential visitors and it should enable to use it presenting the destination through digital tools. The starting point or examples could be: Bristol, and its rich history in industry revolution, as they are already working with these themes. It could also be interesting to look at Jane Austin theme development from Europeana content that could be used for promotion of Bath.

The consultation provided a few viable ideas that need to be tested for improving the technical side of the database.

Executive Conclusions and Recommendations

Limiting the scope and facilitating search are the main key targets that Europeana should be addressing at first. Clustering the content according to the needs of a particular destination might result in a closer cooperation. To uncover the great potential of the resources on Europeana there are certain issues that need to be targeted:

- **Limit the scope of information**
- **Promote the inspiring examples**
- **Improve user experience**
- **Identify pilot destinations and offer what is relevant for them**
- **Target the destinations with the relevant content**

If these are successfully addressed, there is a great potential of Europeana to find its place within the tourism industry, however it is not likely that the industry will take that on - it has to come from Europeana.

Chapter 1.5.6 Tripomatic

Consultation with Lukáš Nevosád (Co-founder and CEO)

Tripomatic is a platform that allows travellers to discover places: it is selling unique personalised experiences. The places on the site are mapped and rated based on their popularity. The trips are planned through the website or a mobile app, that also gives the option to plan the trip by places, tours or hotels. The company claims to know the best way to facilitate the planning: tourists can plan their trips on a day-by-day basis, assessing the time needed to visit an

attraction. The website and the app developed by Tripomatic give access to a diverse travel experiences and there is a possibility to book the services through different partners.

Tripomatic is a very visually inspiring and useful platform, giving full information about the duration of the tour, allowing the tourist to find the most efficient way to go on holidays. Consulting co-founder and CEO of Tripomatic Lukáš Nevosád gave valuable insights on the importance of culture for tourists and Europeana's attractiveness for the tourism industry. The key to Tripomatic's success is the ability to provide unique, personalised and helpful content.

Lukáš Nevosád is familiar with Europeana, as his company is constantly looking for rich content to improve the end-user experience. Awareness of Europeana came from the media channels, followed by the team exploring new opportunities for Tripomatic. While Europeana is considered to have an impressive collection of images and multimedia, it is not the right content for the majority of travellers. Tripomatic is operating on a more general level and, therefore, had to rule out the option to use the resources as these do not add value for the user.

Real value is in safeguarding

Tripomatic is aware of Europeana as they are exploring all of the available resources for data mining. They came from the database and were fascinated by the value that Europeana has in safeguarding the cultural heritage. Unfortunately, there is not much value for tourism, so it was not re-used as part of their solution. Europeana is an amazing product that facilitates access to cultural heritage for wider audiences. To be able to commercialise it in tourism a lot of development needs to be done.

Motivation for travelling

Understanding the relevance of data, it is necessary to discover important motivators for travel. The majority of travellers are interested in beach holidays, so visiting attractions can already be considered a niche area, while then an interest in arts is a new niche of the niche, with only a minority of travellers being interested in that. Understanding, motivating factors in tourism is an essential area for Europeana in view of establishing how their resources can be reused in tourism.

The majority of tourism business will not focus on selling a niche product as it is not sustainable and the number of potential tourists is limited. This is closely linked to the demand from travellers interested more in sharing the tourism experience than seeing a piece of art. People who travel just want to take 'selfies' with well-established brands: be it one of the famous people in Madame Tussaud's or Mona Lisa, but it is not necessarily some piece of art that has immense value. These trends impact the choices made by travel industry selling travel - they are focusing on the things that lead to big sales, not the things that are of cultural value. It is not very likely that Europeana content will be interesting for many tour operators.

The relevance of data

Introducing Europeana to the tourism industry, the importance of data provided is the key. Being a very extensive database, Europeana should be able to filter data before putting it in front of the database user. The only information that is interesting for tourists is on the mainstream sites as they are not visiting cities for long enough. The travel industry focuses on meeting these demands.

Currently, the data on the Europeana database is focused on the main highlights of the cities or popular attractions, which is not appealing to tourists because of its historical and academic nature. Only the creative approach and recreation of content could increase tourist's direct interest. It is not very likely that companies, engaged in mainstream tourism will invest in this curation as it does not create a clear added value contributing to their sales.

What Europeana could do is try and select the images that relate to the main tourism destinations and have some unique information. Approaching the travel industry with pre-selected items that appeal to the mass could make a difference. It is clear that this has to be done by Europeana, as the travel industry is not likely to invest their time in searching this raw resource. Currently, all they need to sell trips is the content they find on Wikimedia or other related sites. Although maybe sometimes not correct, these sites provide sufficient amount of information and are easy to use. To be able to compete with that, Europeana needs to add value to their current offering.

Engage in storytelling

Storytelling in marketing has been trending for a long time now, and Europeana is an excellent source of inspiration. As businesses are focused on sales, public bodies such as NTO's or cities are more engaged in creating value for the destination. They could be the right audience to pick up the digitalised cultural heritage and showcase their destination. There is a potential to use the unique information Europeana has to create more value for the destinations.

Reach out for the developers

Europeana should also consider reaching out to the developer community with the focus on tourism. Many are still looking to establish themselves. A simple API is an attractive feature of Europeana, but it is not easy to come across. There are various options to address this community such as organising a competition or a Hackathon. A competition is a preferred way, giving more time for developers to work on a sustainable product and it does not require significant investments. Reaching them might be challenging, but targeting them via their preferred communication channels will work.

Potential in buildings

There is a niche, for Europeana to take advantage of the major potential online. Sufficient information is available online on buildings and architecture. Both, the interior and exterior are interesting for tourists, therefore appealing to businesses selling travel.

Extending the database of pictures to buildings that are architectural landmarks is the way forward for Europeana: the tourism industry could make use of it. Companies such as Tripomatic could make use directly, as there are no alternatives yet. It is critical though to solve any licensing issues before going deeper: offering an efficient solution could benefit the tourism industry. Europeana should consider this option as the data on the buildings is scarce, and Europeana could take the lead in organising and presenting it.

Executive Conclusions and Recommendations

Europeana is an attractive database that has accumulated vast amounts of cultural heritage data and made it available for the wider audiences. Considering its current status. Europeana is not very appealing for the tourism industry. The current resources are not useful for promotion, as other alternatives available are more attractive and easier to use. Though there is a potential, if it targets the right audiences with curated content through the appropriate channels. The key points of the consultation are summarised below:

- **Explore the motivation for travel before targeting the industry**
- **Focus on relevant data for certain segments**
- **Appreciate the value of safeguarding**
- **Engage in storytelling**
- **Reach out to the developer community**
- **There is a potential offering content related to buildings and architecture**

There are different channels and ways for Europeana to be useful for the tourism industry even though there are certain issues to be considered. Identifying areas where there is great potential

and focusing on these could create a mutual synergy between the tourism industry and cultural heritage online.

Chapter 1.5.7 TripAdvisor

Consultation with Helena Egan (Industry Relations)

TripAdvisor is one of the most influential customer review sites in travel that pioneered the industry and impacted enormously on the whole industry. Starting as a review site, it grew to a multimillion business operating few dozens of well-established travel brands with the same message in the center, to enable travellers to plan and book the perfect trip. TripAdvisor offers advice to millions of travellers and provides a wide variety of travel choices and planning features with seamless links to booking tools that check hundreds of websites to find the best hotel rates. TripAdvisor branded sites make up the largest travel community in the world, reaching 375 million unique monthly visitors, and more than 250 million reviews and opinions covering more than 5.2 million accommodations, restaurants and attractions. The sites operate in 45 countries worldwide.

It was important to reach out to one of the most influential tourism industry players and consider the potential for Europeana to establish a partnership. The consultation was carried out via e-mail and opportunities were evaluated internally by the TripAdvisor team. Currently, there are a few reasons, why Europeana's content does not align with TripAdvisor's overall goals. There are a few points that are preventing Europeana to partner with TripAdvisor. These highlights the issues that need addressing before moving towards the potential partnership in the tourism industry.

Understanding TripAdvisor

From Europeana's perspective, it is important to understand that the aggregated data in its database is not in line with TripAdvisor's focus. They are focused on listing physical places that tourists can go to, such as museums or libraries. TripAdvisor only features information on points of interests relating to a Particular area and enables the visitors to share their personal experiences, not the content of the places visited. Individual listings of artworks or other more granular things are not TripAdvisor's remit while these are central to Europeana. Seeking to explore a successful partnership, Europeana's offering should be based on the needs of the partner. Providing that any information Europeana is distributing, is aligned with TripAdvisor's activities, this could spark interest for a potential partnership. At the moment, this is however not the case.

Technological differences

It is important to establish the technical possibilities of harvesting the information from Europeana. Currently, the offer of listings of museums or libraries cannot be used by TripAdvisor, as they do not have a way to pull available information via an API. The content TripAdvisor provides for the users also does not have the functionality to display texts, sounds or videos, which prevents the demand for content that is potentially available on Europeana. Willing to cooperate with TripAdvisor, Europeana needs to find a way to add value or offer a very exclusive product that could make TripAdvisor more efficient. Otherwise, there is no need for TripAdvisor to change their current model which is sustainable enough.

The cooperation with the cultural institutions

TripAdvisor has a relationship with cultural institutions that is working and the Europeana offer is currently not advantageous for them. The content is collected from visitors as well as owners of museums or other cultural institutions. They are the best experts to decide on which information or photos to include in their listing page. They have the possibility to upload those through the Management Centre free of charge. Working with one provider, such as Europeana, will change

the core of TripAdvisor content which is not valuable, as the site intends to focus on user-generated content.

Executive Conclusions and Recommendations

There are four main points that are summarised in the conclusions below: it is not only certain improvements that Europeana could make, but the most important is to tailor its offer in line with the industry needs to convince the company for a change:

- **Assess the value the operation brings for Europeana**
- **Identify the fields of activity on the TripAdvisor**
- **Increase the value of the offering to convince any technological changes**
- **Consider the working model with the institutions to be able to offer a better solution**

Prioritising these points might lead to a potential partnership, but there are a lot of changes that need to be done. It is important to prioritise the value of the partnership in advance and assess the benefits for Europeana.