

Framework for Monitoring Travel Sentiment in European Markets

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Request for Proposals

Framework for Monitoring Travel Sentiment in European Markets

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1. Introduction

This Request for Proposals (RfP) is launched in the framework of an ad-hoc grant of the European Union (EU) to the European Travel Commission (ETC) to support European National Tourism Organisations (NTOs). This RfP is part of a project which aims to understand the short-term travel intentions and preferences of European citizens within an ever-changing travel environment.

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

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1.1 About the European Travel Commission (ETC)

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

ETC empowers its members, stakeholders, and the wider industry to shape the future of tourism in Europe for the benefit of all. It offers its members a comprehensive portfolio of services in knowledge sharing, destination marketing, and advocacy, while fostering collaboration and the exchange of best practices. ETC is established as a private non-profit association (AISBL) under Belgian law.

In line with its mission, ETC works closely with the European Union on initiatives that advance Europe's status as the world's most competitive, sustainable and inclusive travel destination.

Further information about ETC can be found on the website europeantravelcommission.com.

2. Information about the project

2.1 Project Background

This project represents a continuation of the European Travel Commission's (ETC) reports on [*Monitoring Sentiment for Intra-European Travel*](#), originally launched in 2020 in response to the disruption caused by the COVID-19 pandemic. Since its inception, the project has become an important source of market intelligence for European

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tourism stakeholders, providing timely insights into European residents' travel intentions, preferences, concerns, and behavioural shifts.

Since the pandemic, Europe's travel and tourism sector has demonstrated a strong recovery, driven primarily by intra-European travel. Strong regional connectivity, the accessibility of short-haul travel, and the continued attractiveness and diversity of European destinations have all contributed to the sector's resilience.

At the same time, travel dynamics are shaped by a range of other external factors, including inflationary pressures, geopolitical instability, climate-related concerns, and evolving consumer expectations. Ongoing conflicts and economic uncertainty continue to influence travel costs, traveller confidence, perceptions of safety, and spending behaviour, while climate-related events are increasingly affecting travel patterns and destination choices as well.

Around 80% of inbound travel in Europe is intra-regional. As conflicts emerge elsewhere in the world (i.e. the Middle East), and travel costs continue to rise, European travellers are expected to favour travel options that are closer to home, more affordable, and offer a greater sense of security, further reinforcing the importance of intra-regional travel for the resilience and competitiveness of the European tourism sector.

Against this backdrop, understanding European travellers' preferences, attitudes, concerns, and short-term travel intentions remains essential for destinations and tourism stakeholders. Timely and reliable insights into evolving travel sentiment are crucial for supporting evidence-based decision-making and helping destinations anticipate changing market dynamics.

The purpose of this Request for Proposals (RfP) is therefore to conclude a Framework Service Agreement with an experienced consultant (hereinafter referred to as the contractor) to deliver a series of analytical reports monitoring European residents' travel sentiment and short-term travel intentions. The project aims to support European destinations and tourism stakeholders by enhancing their understanding of evolving traveller behaviour and emerging tourism trends.

The activities subject to this RfP are co-financed by the European Union.

2.2 Objectives

The purpose of the project is to provide timely updates about the short-term travel intentions of European citizens. The project shall monitor people's travel sentiment and preferences, including types of destinations and experiences, holiday periods, concerns relating to travel in the next months, etc. Findings should support NTOs in better understanding the sentiment for intra-European travel, considering both current challenges and potential future obstacles that may arise within the European travel sector. Additionally, findings should also shed light on Europeans' intentions to travel responsibly, e.g. go for off-peak travel, choose lesser-known destinations, support local businesses, and use greener transport options, and monitor how these evolve over time.

The project should be executed in different waves to reflect the evolving travel sentiment and preferences.

The project shall provide insights into the above-mentioned aspects with regard to domestic and intra-European travel. Measuring the intention to travel to destinations outside Europe is not part of the scope of this project.

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2.3 Target groups

The project shall examine the travel intentions of citizens from the following ten European source markets – Austria, Belgium, France, Germany, Italy, the Netherlands, Poland, Spain, Switzerland, and the United Kingdom.

- For France, Germany, Italy, and the United Kingdom, a minimum of 750 respondents will be required.
- For Austria, Belgium, the Netherlands, Poland, Spain, and Switzerland, a minimum of 500 respondents will be required.

The ability to reach more than the minimum number of respondents, or to add extra markets is considered an advantage.

3. Deliverables and requirements

Failure to comply with the requirements of this paragraph may render the Proposal non-compliant, and the Proposal may be rejected. The Proposal:

- must be received by ETC in accordance with section 4;
- must be quoted in **Euro**;
- must not exceed the contracting authority's budget indicated in section 3.

Note that all tenderers shall submit only **one proposal** per RfP. A tenderer who submits more than one proposal will cause all the tenderer's proposals to be rejected.

The contractor is expected to deliver the following minimum technical requirements:

3.1 Deliverables

ETC has foreseen the following core deliverables per research wave:

- Ready for analysis datasets in SPSS and Excel, accompanied by a data dictionary.
- An executive briefing in electronic format (PowerPoint, Word, etc.).
- A report in electronic format (PowerPoint, Word, etc.)
- A webinar to present key results.

All deliverables should be in **British English** (as opposed to American English). The contractor is responsible for ensuring that the final deliverables are of sufficiently high quality (both in terms of the English language and neat design/structure following ETC visual guidelines) to enable speedy analysis of results.

3.2 Minimum Requirements

- a) The contractor shall collect data in waves to reflect the evolving travel sentiment and changing preferences and behaviours in the target groups specified in section 2.3. Each wave will examine travel intentions for the next six months.
- b) The contractor is expected to ensure methodological continuity with the previous waves of the project to preserve the comparability and long-term consistency of results. The methodology currently used in the project is described in detail in the Methodological Note (Annex A). The contractor may also propose methodological innovations, provided these do not compromise comparability with historical data.
- c) The contractor will review and update the project questionnaire in close cooperation with the ETC team before each survey wave. While the survey includes a set of core questions that should remain stable over time for trend analysis purposes, the survey is intended to remain dynamic and adaptable to emerging developments potentially affecting travel sentiment.¹ The contractor shall proactively propose improvements, refinements and new question modules that enhance the analytical, strategic and communication value of the project. The contractor should foresee the inclusion of up to two new questions per wave, including questionnaire design support, translation and methodological recommendations.
- d) Upon completion of the data collection for each wave, the contractor will be expected to deliver ready-for-analysis datasets in SPSS and Excel, accompanied by a data dictionary. These datasets should include data for all markets.
- e) The contractor will provide an Executive Briefing for each wave, providing a concise, insight-driven overview of the most relevant developments emerging from each research wave. The Executive Briefings are internal documents providing key results for each wave without deep analysis and interpretation, but highlighting the statistically significant changes
- f) For each wave, the contractor will analyse the results and prepare a report. The reports should include a description of the applied methodology and present an interpretation of results at European (aggregate results for all markets) and source market (results per market) levels. It is required that the significant variations between wave results and individual market results are highlighted in the reports.
- g) The reports should offer interpretations of results, considering the latest news, publications, events, etc. - i.e. the reports should address both the "What" and "Why" aspects of the findings, as well as provide relevant recommendations to NTOs and tourism businesses based on the results of the survey.
- h) The contractor shall also provide webinars to share the most relevant findings of each research wave. The contractor shall manage the technical setup for the webinars, including the choice and set up of the platform,

¹ Number of questions included in the past waves: Waves 24 & 25 – **20 questions**, Wave 23 & 22 – **23 questions**, Wave 21 – **22 questions**

testing audio and visual equipment, and ensuring a smooth experience. The contractor will also set the registration process for the webinars, e.g. providing a registration link and list of participants to the ETC Executive Unit².

i) Throughout the reports and webinars, results should be supported by charts, maps, and tables that are both visually appealing and highly informative.

j) The time to deliver all materials per wave (i.e. data collection, data files, executive briefing, report, and webinar) should not exceed 5 weeks from the launch of the data collection. The materials are delivered to ETC sequentially (as opposed to all at once) based on the agreed timeline for each wave.

3.3 Technical requirements

Publicity

The project deliverables must clearly acknowledge ETC's and the European Union's financial contribution. In this respect, the contractor will be required to give prominence to the following logos on the project deliverables (data files, executive briefing, reports, webinars, etc.) produced in the framework of this project:

Logo of the European Travel Commission



Name and emblem of the European Union



The guidelines for the use of the EU emblem, as well as the respective graphic files, are available for download at the following link: etc-corporate.org/publicity-guidelines/

Style

All deliverables need to be in line with the style guidelines provided by ETC and its partners.

Assignment of rights

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

- a) to reproduce project material or incorporate project material, and to reproduce it as incorporated in such other material;
- b) to create and reproduce derivative works from the project material;
- c) to distribute copies and display the project materials publicly, whether independently or as part of other material;

² ETC will be in charge of sending webinar invitations to members and partners, creating communication materials for Social Media and moderating the webinar (welcome, introducing speakers and moderating Q&A)

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

Reporting

Regular written progress reports must be provided to ETC.

3.4 Procedure to place orders

The contract between ETC and the contractor will be a Framework Agreement, the implementation of which is only carried out through separate orders placed by ETC according to actual needs. ETC foresees the following method for placing orders:

- ETC informs the contractor by email about the number of research waves needed and their timings. ETC shares with the contractor any necessary information about each research wave (e.g., a request to add/re-place/adjust a new question, add an optional deliverable, etc.) to facilitate the analysis and production of reports. The contractor then proceeds to execute the task in accordance with the pre-negotiated terms and conditions.
- The contractor maintains a list or register in which every order placed by ETC is included and from which at least the following information can be derived: the number of orders placed, the value of each order, and the total value of all orders placed.
- This list or register must be available to ETC at any time during the implementation period of the assignment.
- The contractor is expected to provide regular updates on the progress and performance of all orders placed.

3.5 Implementation period

The Framework Agreement has an initial estimated duration of 3 years, and it is expected to start in August 2026.

The duration of the Framework Agreement may be extended for a further period to be determined upon mutual agreement between ETC and the contractor (for up to an additional one year).

The duration of the Framework Agreement is independent of the duration of each order placed by ETC in the framework of this agreement, which should include a specific start and end date.

3.6 Budget and terms of payment

The total maximum contract value for the entire term of the Framework Agreement is 215.000 EUR (two hundred and fifteen thousand), excluding VAT and including all taxes, fees, charges and costs.

The above value is indicative and not binding on ETC in any way. It represents the maximum possible expenditure for the given scope of the project, its requirements and deliverables. The total amount of the purchase orders placed by ETC may not necessarily correspond to the above-stated value.

The maximum budget per wave is 23.000 EUR (twenty-three thousand) for the core tasks and deliverables.

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Invoicing will only occur after the completion of each research wave, following the implementation of all requested changes and adjustments, and upon approval of the deliverables by ETC.

4. Submission of proposals

Proposals must be **clear, concise** (not exceeding 15 pages in total) and **written in English**, so there can be no doubt as to word meaning and figures.

Proposals must include:

- 1) Brief company profile.
- 2) Description of team credentials, field of expertise and roles of the people involved in the project.
- 3) References to relevant experience in delivering comparable work as outlined in section 3.2. “Minimum Requirements” (i.e. case studies or reference list - including project goals, processes, dates and verifiable deliverables, links if available).
- 4) A detailed and clear description of the research methodology, including sampling, tools and platform(s) to collect data.
- 5) A detailed description of the structure and content of the envisioned reports.
- 6) Detailed timeline for the completion of the project, including the timings needed per wave, i.e. survey revision and update, data collection phase, analysis and delivery of results (i.e. the time needed for the delivery of the data files, executive briefing, reports, and webinars). ETC foresees at least two rounds of revision on the following deliverables under each wave - the Executive Briefing, Report.
- 7) Detailed breakdown of the economic offer by completing Annex B, including pricing for: (i) all core tasks and deliverables within the project scope; and (ii) optional tasks and deliverables that may be commissioned by ETC for certain waves.³ All prices should be quoted in Euro, exclude VAT⁴ which may be recoverable by ETC (being a private VAT-registered entity based in Belgium) and include any other taxes, fees, charges and costs. The economic offer should include all costs following the project's scope of work (including third-party costs, if any). Any item that is essential for the smooth running of the project, as indicated within this document, even though not specified, shall be read as included in the list of core tasks and deliverables. The template provided through Annex B may not be altered - a single price per wave must be provided.
- 8) If any work for the project is to be subcontracted to a third party, the contractor must clearly specify in its proposal all tasks, prices and deliverables that are to be outsourced. Any costs related to outsourcing

³ **The optional tasks will not be taken into account in the price evaluation.** However, they provide applicants with an opportunity to showcase broader capabilities and additional services that may be considered by ETC for a separate purchase. Price evaluation will be conducted purely based on the prices for core tasks & deliverables.

⁴ https://taxation-customs.ec.europa.eu/what-vat_en

shall be borne by the contractor. The contractor will be the sole party responsible for the delivery of the outsourced work.

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

4.1 Use of artificial intelligence

The Contractor is allowed to use Artificial Intelligence (AI) in both the preparation of the proposal and, if awarded, the execution of the project. However, any use of AI must be clearly disclosed as part of the proposal submission. This disclosure must include:

- A description of the AI tools or technologies used or intended to be used;
- Identification of the specific areas of the proposal where AI was applied;
- A preliminary outline of the tasks, processes, or deliverables during contract execution where AI is expected to be employed.

4.2 Deadline for submission

Proposals must be received by **10/07/2026** at 23:59 (CEST).

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

4.3 Questions

Questions can be sent in written form via the contact form on the ETC website (<https://etc-corporate.org/contact/>) with the subject "RfP Monitoring Travel Sentiment in Intra-European Markets" until **03/07/2026** at 23:59 (CEST).

ETC will provide the answers to all questions received by **06/07/2026** at **23:59 (CEST)**.

5. Award criteria

Applications will be assessed against the quality criteria first and then against the financial criteria. The relative weights assigned to each of them are described below.

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

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

Quality criteria

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

Tenders scoring less than 50 points in total points for quality criteria will be excluded from the rest of the assessment procedure.

<u>Quality criteria</u>	<u>Weight</u>
Criterion 1. Company profile and qualifications of the project team <ul style="list-style-type: none"> The extent to which the credentials of the applicant and qualifications, fields of expertise, roles and responsibilities of the proposed project team are suitable for the execution of the project. Proven experience in delivering comparable work, including proven experience with a proposed methodological approach. 	15%
Criterion 2. Project goals <ul style="list-style-type: none"> Complying with the purpose of the project. Complying with the structure outlined in the Request for Proposals. Overall clarity of the proposal. 	30%
Criterion 3. Methodological approach <ul style="list-style-type: none"> Quality of proposed primary research methodology. Overall approach, tools and techniques to collect data. Approach to preparing the data files. Approach to preparing the Executive Briefs, Reports, and Webinars to display the results of the survey. Quality of proposed deliverables. 	35%
Criterion 4. Added value <ul style="list-style-type: none"> The extent to which the proposal offers feasible services and/or deliverables that add value to the minimum requirements and deliverables. Level of innovation and creativity brought to the project. Level of flexibility brought to the project to provide tailored-made research. 	15%
Criterion 5. Timeline The project timeline is detailed and in accordance with this Request for Proposals.	5%

Each quality criterion will be given a score in a range from 0 (zero) points to 10 (ten) points in accordance with the following scale:

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

6. Final provisions

By submitting a proposal, the Contractor declares that it:

- is not bankrupt or subject to insolvency proceedings;
- has not been convicted of fraud, corruption, or other serious professional misconduct;
- is in compliance with applicable tax and social security obligations;
- has the legal capacity to perform the contract.

ETC reserves the right to request supporting evidence at any stage of the procedure.

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

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

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

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