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# REQUEST FOR PROPOSALS

## ETC Strategy 2030

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<b>Award entity</b>	European Travel Commission
<b>Issuance date</b>	09/12/2021
<b>Deadline for applications</b>	31/12/2021
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<b>Estimated duration</b>	10 months

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## 1. INTRODUCTION

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

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

### 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 association was established in 1948 and is headquartered in Brussels (Belgium). ETC is established as a private body (AISBL) under the law of Belgium.

ETC's mission is to strengthen the sustainable development of Europe as a tourist destination. For its member NTOs, ETC provides a broad portfolio of research, marketing and advocacy services and encourages the sharing of best practices.

- ETC **research** activities help the organisation and its members understand the business environment, detect new growth opportunities and formulate suitable promotional strategies.
- ETC **marketing** activities create synergies, leverage and economies of scale for European NTOs under the umbrella brand Europe - whilst still conveying their countries' distinctive and individual characteristics - to build global trust among tourists and the travel trade.
- ETC **advocacy** efforts contribute to raising awareness and understanding among European authorities and the general public of the importance of tourism and the need to ensure its development through appropriate collective measures.

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

The association comprises the following key decision and operational bodies:

- The **Board of Directors** oversees ETC's policy and responsibilities on a continuous basis and puts forward programmes on issues of importance to the association.
- The **General Meeting** takes all major decisions on proposals by the Board. Changes of strategies, budgets, and big operational decisions are all approved by the General Meeting (held twice a year), which comprises all ETC members.
- The **Marketing Group** acts as a think tank that provides the association with strategic advice on promotion and other marketing-related aspects. It also acts as a forum for ETC members and partners to share information and best practices in the field of destination marketing to facilitate benchmark analysis. It comprises the marketing directors of ETC member NTOs.
- The **Market Intelligence Group** acts as a research think tank and provides the association with strategic advice on research-related aspects. It also acts as a forum for ETC members and partners to share information and best practices in the field of market intelligence to facilitate benchmark analysis. It comprises the research directors of ETC member NTOs.
- The **Overseas Chapters** which represent ETC in the geographical markets where the association operates and provide market input and guidance into the activities of the association.
- The **Executive Unit** is the associations' administrative and operational body (secretariat), which coordinates the different bodies of the association and implements the annual programme of activities.

Further information about ETC can be found on the website [www.etc-corporate.org](http://www.etc-corporate.org).

## 2. PROJECT OVERVIEW

ETC intends to commission the development of a mid-term (2023-2030) strategic framework, which shall steer the scope of the annual programme of research, promotional and advocacy activities of the association. The new strategic framework should derive from the association's present marketing strategy "**Horizon 2022**", which sets how Europe is

branded and promoted globally, and update it and adapt it to the **current global challenges and opportunities** of the travel and tourism industry, while considering **ETC members' priorities** for the coming years.

## 2.1. BACKGROUND

Worldwide tourism has been growing steadily over the past decade; however, the COVID-19 pandemic brought this evolution to a complete halt. Global tourism saw an unprecedented decline in international tourist arrivals of 73% in 2020 compared to the previous year, while Europe was down 68% over the same period<sup>1</sup>. The gradual easing of restrictions, the ramp-up in COVID vaccinations in Europe, and the reopening of the EU to fully vaccinated travellers from third countries have provided some momentum allowing travel and tourism activities to restart as 2021 progressed<sup>2</sup>. However, downside risks remain following the surge in infections of new variants, which could force the return of travel restrictions.

Domestic travel has so far supported the void left by international inbound travel to Europe and has the potential to be a bridge to recovery in those destinations that are not highly dependent on international tourism. However, long-haul travel demand is expected to recover more slowly. According to Tourism Economics' latest forecasts, long-haul demand is expected to return to its 2019 market share only by 2030. Nonetheless, long-haul source markets are also expected to make significant contributions to the growth in European travel demand over the coming decade as travel restrictions are fully lifted and economies recover.

The COVID-19 pandemic has provided destinations with the opportunity to better address changing consumer needs and support tourism development that is more respectful towards the environment, local communities, and economies. The turbulence brought by the pandemic on tourism's decade-long boom drives momentum for a stronger commitment to travelling in a more responsible way. As travellers become more concerned about their impact on the environment, destinations will respond with measures that prioritise quality tourism over quantity, and that are more responsible with the environment and local economies, while fostering deeper and richer travel experiences and human connections between locals and visitors.

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<sup>1</sup> UNWTO World Tourism Barometer - Volume 19, July 2021

<sup>2</sup> Tourism Economics

The European Union has started working on a new strategy for tourism<sup>3</sup>, whose aim shall be to help the sector move towards a more competitive and resilient path through a green and digital transition. In a similar way, ETC expects that its efforts to support the recovery will allow this transition path to create a tourism ecosystem that is resilient, greener and which leverages digital advances.

## 2.2. HORIZON 2022

The marketing strategy “Horizon 2022”<sup>4</sup> implied a transition of ETC’s promotional efforts based on a global thematic market segmentation, as opposed to a traditional geographic segmentation. A thematic approach to market segmentation means that ETC’s promotional activities present Europe on the global stage as a collection of signature travel experiences that connect with people’s passions. The stories about these experiences are bundled in the following three consumers’ passion points and connected to Europe’s brand values and unique selling propositions:

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

This passion point connects with the community of Immersive Explorers<sup>6</sup>, 18-34-year-old couples with children, and solo travellers (male bias) who find togetherness in the wilderness and enjoy experiencing nature at their own pace, with a focus on wildlife, outdoor pursuits, cycling, hiking, wild foods, countryside, and local culture. They want to learn about new cultures, experience new adventures and expand their perspectives from what they learn when travelling.

- **Creative Cities:** Inspiring experiences and stories framed around the local cultural scene and lifestyle (contemporary arts, architecture and design, fashion, music, street

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<sup>3</sup> EU Tourism Transition Pathway

[https://www.interregeurope.eu/fileadmin/user\\_upload/plp\\_uploads/events/Webinars/Strategies\\_for\\_a\\_competitive\\_and\\_sustainable\\_tourism\\_sector\\_workshop/Ramune\\_GROW\\_presentation.pdf](https://www.interregeurope.eu/fileadmin/user_upload/plp_uploads/events/Webinars/Strategies_for_a_competitive_and_sustainable_tourism_sector_workshop/Ramune_GROW_presentation.pdf)

<sup>4</sup> Please read the strategic document on <https://etc-corporate.org/our-campaigns/horizon-2022/>

<sup>5</sup> Please see the Slow Adventure Guide for a detailed overview of the ethos of the Slow Adventure movement: [https://etc-corporate.org/uploads/2020/03/The\\_Slow\\_Adventure\\_Guide\\_compressed.pdf](https://etc-corporate.org/uploads/2020/03/The_Slow_Adventure_Guide_compressed.pdf)

<sup>6</sup> For further information on the profile the community of Immersive Explorers see <https://etc-corporate.org/reports/tourism-passion-communities-immersive-explorers/>

and performing arts) of small or medium-size urban areas, in line with the European Commission's Cultural and Creative Cities Monitor<sup>7</sup>.

This passion point connects with the community of City Life Enthusiasts<sup>8</sup>; 18–34-year-old

couples with children, and solo travellers (female bias) who swap landmarks for local life, trade the well-worn path for a secret side street and crave a culture of creative contrast and artistic reinvention. They want to “live like a local” while developing their own creativity and put emphasis on the atmosphere of the places they visit.

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

This passion connects with the community of Explorers of Cultural Identity and Roots<sup>9</sup>, 35+ year-old couples with children and empty nesters (Male bias) who step beyond borders into the theatre of world history, learning from the stories of yesterday with a desire to discover their own roots.

In addition, travel experiences that relate to local gastronomy and lifestyle are highlighted across all passion points in order to communicate a comprehensive and unique story about Europe.

Within each of the three interest-based communities described above, ETC's promotional activities target high-net-worth, curious (semi-)Free Independent Travellers (FITs) from urban “melting pots”, travelling for leisure and who are at the dreaming, consideration and/or sharing stage. A higher preference exists for engaging repeat visitors as opposed to first-time visitors.

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<sup>7</sup> Further information on the European Commission's Cultural and Creative Cities Monitor can be found here: <https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor>

<sup>8</sup> For further information on the profile the community of City Life Enthusiasts see <https://etc-corporate.org/reports/tourism-passion-communities-city-life-enthusiasts/>

<sup>9</sup> For further information on the profile the community of Explorers of Cultural Identity and Roots see <https://etc-corporate.org/reports/tourism-passion-communities-explorers-of-cultural-identity-and-roots/>



The ETC strategic framework (2023-2030) shall further build on these themes and aspects that really distinguish Europe from other continents. The strategic framework should also expand the scope of the marketing strategy “Horizon 2022” and set mid-term goals for ETC as an association beyond its promotional activities. By doing this, Europe’s brand is expected to become more sophisticated and meaningful, instead of being generic.

### 2.3. ETC MEMBERS’ PRIORITIES

The ETC strategic framework (2023-2030) shall contribute to achieving the following objectives:

- Restore and reinforce consumer confidence in Europe as a world class travel destination known globally for its sustainable offer and attracting responsible and environmentally conscious travellers.
- Build a distinctive brand image of Europe by broadening perceptions of what the continent has to offer as a destination.
- Help spread tourism flows to lesser-known locations and reduce seasonality, while also addressing the impact of tourism on climate change.
- Provide a platform that fosters transnational public-private partnerships and leverages resources for the joint promotion of European destinations.

### 2.4. METHODOLOGY

ETC has carried out a broad range of research that could feed into the strategic framework. Therefore, it is envisaged that none or very little additional research would be required to satisfactorily complete the task described in this request for proposals. All ETC publications, reports and former strategic papers, which may prove useful when developing

the strategic framework, will be made available to the selected contractor(s). See *Annex 1* for a detailed list of research and studies available.

ETC will require the selected contractor to analyse and interpret the above-mentioned information to develop recommendations that will feed into the final strategy. The preparation of the strategy paper shall be conducted in close collaboration with ETC's Marketing Group, with inputs from the Market Intelligence Group and the Board of Directors, to make any decisions or clarify any questions not yet answered by the research analysis (see *section 1.1 About the European Travel Commission*). This process shall warrant the full endorsement of the final strategy paper by all bodies of the association. The contractor is therefore required to propose and apply a methodology that is suitable and that can satisfy the demands of the association.

The ETC Executive Unit will coordinate the project and will be the main contact point for the contractor during project implementation.

### **3. DELIVERABLES AND REQUIREMENTS**

The contractor is expected to deliver the following minimum and technical requirements. Proposals which are not compliant with these requirements will be excluded from the evaluation process.

#### **3.1. MINIMUM REQUIREMENTS**

ETC envisages the strategic document to include the following elements, inter alia:

**1) Brief analysis of the current situation of Europe as a travel destination (Where are we?)**

Based on available research and recent tourism indicators, this section should present the current positioning of Europe within the global market, highlight key barriers and opportunities for the development of travel to Europe from domestic (intra-European) and long-haul markets and mention megatrends that will shape the global marketplace in the coming years (i.e. climate change, post-pandemic recovery, etc).

**2) Key areas of intervention (Where could we be?)**

This section should present possible future scenarios for Europe as a travel destination in the global marketplace, while highlighting the benefits for the tourism value chain,

ETC and the Europe brand overall. Clear objectives and goals that ETC and European destinations should attempt to achieve through joint efforts should be set.

**3) Actions in the research, marketing and advocacy area (How do we get there?)**

This section should provide an overview of specific actions in the field of market research, branding, promotion and advocacy that ETC should undertake in the coming years in order to achieve the objectives and goals set.

**4) Key performance indicators (How do we measure success?)**

This section should establish realistic, but ambitious, key performance indicators to monitor progress and assess the success of the strategy. It should also present the important facts that are required to accomplish these goals, potential risks and how they will be measured.

### **3.2. TECHNICAL REQUIREMENTS**

**- Style**

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

**- Assignment of rights**

The contractor shall explicitly provide ETC with a worldwide, royalty-free, non-exclusive, perpetual (for the duration of the applicable copyright) license to exercise the Intellectual Property Rights in all project outputs.

**- Reporting**

Regular written progress reports must be provided to ETC.

### **3.3. DELIVERABLES**

The contractor is expected to deliver a full document in electronic format (.pdf file), an executive summary (.ppt file) and an infographic/one-pager (.pdf file) with the outcomes of the project.

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

In addition, the contractor will be required to give an oral presentation, either online or in person, at an exclusive event of the European Travel Commission upon project completion.

### **3.4. IMPLEMENTATION PERIOD**

The implementation period of the project is expected to start in **February 2022** and conclude by **November 2022**.

The following milestones have been set over this period to serve as appropriate checkpoints that shall ensure the timely delivery of the work:

- **2-3 February 2022:** Kick-off meeting and working session<sup>10</sup> with ETC's Board of Directors, Marketing Group and Market Intelligence Group
- **May 2022:** Delivery of a first draft of the strategy and different scenarios for review and validation by ETC's Board of Directors
- **15 November 2022 (tbc):** Final project presentation

Additional working sessions or checkpoints might be set over the project implementation period as deemed necessary according to the methodology proposed by the contractor.

## **4. BUDGET**

The maximum available budget for this project is 50,000 EUR (fifty thousand euros) excluding VAT and including other taxes, if applicable.

Invoicing will be done after submission of deliverables only. ETC will first approve that the deliverables are correct and then ask the contractor to submit an invoice according to the following breakdown:

- 25% after completion of the first strategic working session
- 25% after completion and approval of a first draft of the strategic paper
- 50% after completion and approval of the final deliverables.

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<sup>10</sup> This working session is expected to take place in Engelberg (Switzerland) provided that the epidemiological situation at that time allows. The selected contractor is expected to attend onsite to conduct the working session. Travel expenses are to be borne by ETC.

ETC expects to be invoiced for the work in Euros. All payments shall be made by electronic bank transfer in Euros, so the contractor is required to have a bank account in Euros.

## 5. SUBMISSION OF PROPOSALS

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

Proposals must include:

- 1) Brief **company profile**
- 2) Description of the **methodology**, execution plan, and resources allocated
- 3) Description of **team credentials**, fields of expertise and roles of the people involved in the project
- 4) **References** to relevant experience in delivering comparable work (i.e., case studies or reference list - including project goals, processes, dates and verifiable deliverables)
- 5) **Timeline** for the completion of the project
- 6) Detailed breakdown of the **economic offer**. All prices should be quoted in Euro and exclude VAT (ETC being a private VAT-registered entity based in Belgium) and include any other taxes, if applicable. The economic offer should include all costs following the scope of work of the project (including third party costs, if any). Any item that is essential for the smooth running of the project, as indicated within this document, even though not specified, shall be read as included in the list of requirements.

If any work for the project is to be subcontracted to a third party, the contractor must clearly specify in its proposal all tasks and deliverables that are to be outsourced. Any costs related to outsourcing shall be borne by the contractor. The contractor will be the sole responsible party 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/>

### 5.1. DEADLINE FOR SUBMISSION

Proposals must be received by **31/12/2021** at 23:59 (CET).

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

## 5.2. QUESTIONS

Questions about this request for proposals must be sent in written form via the contact form on the ETC website <https://etc-corporate.org/rfp-etc-strategy-2030-qa/> with the subject “RFP ETC Strategy 2030” until **23/12/2021** at 14:00h (CET).

ETC will have published the answers to all received questions on the above website by 24/12/2021 at 14:00h (CET).at the latest.

## 6. AWARD CRITERIA

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

- **Quality criteria:** 70% of the total evaluation score
- **Financial criteria:** 30% of the total evaluation score

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$$\text{Final score} = [(\text{lowest price} / \text{proposal price}) \times 100 \times 0.3] + (\text{quality score} \times 0.7)$$


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### 6.1. QUALITY CRITERIA

The quality of the proposal is defined as a minimum set of delivered services as described in *section 3. “Deliverables and Requirements”*. Each of these criteria and the relative weights assigned to them are described below.

Quality criteria	Weight
<b>Methodology.</b> The methodology and the quality, creativity and innovation of the project approach.	60
<b>Qualifications of the project team</b> Credentials of the project manager and other assigned team members, with an emphasis on know-how in the field of branding, marketing, tourism, sustainability and strategic consultancy.	20
<b>Experience</b> The proven relevant experience of delivering comparable work.	20

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:

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.

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

## 7. FINAL PROVISIONS

This Request for Proposals is in no way binding on ETC. Any contractual obligation commences only upon signature of a 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. All information submitted will remain confidential.

**We thank you in advance for your time and interest in working with ETC.**

**Brussels, 9/12/2021**

**European Travel Commission**  
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## **8. ANNEX**

### **ANNEX 1 – List of research publications available**

#### **2021**

- European Tourism 2021 – Trends & Prospects (Q1) (Q2) (Q3) (Q4)
- Long-Haul Travel Sentiment Survey & Index
- Monitoring Sentiment for Intra-European Travel
- Handbook on Encouraging sustainable Tourism Practices
- Benchmarking Sustainable Tourism Indicators in ETC Countries
- Exploring sustainable travel attitude and behaviour post COVID-19

#### **2020**

- The Changing Tourism Environment and its Impact on the Work of NTOs/DMOs
- Benchmarking Sustainable Tourism Indicators in ETC Countries
- Handbook on COVID-19 Recovery Strategies for NTOs

#### **2019**

- The Slow Adventure Guide

#### **2018**

- Horizon 2022 Strategy
- Study on Tourism Passion Groups

#### **2017**

- Study on Tracking Multi-Destination Travel in Europe from Long-haul Markets
- ETC-EC Study on Chinese Media Consumption Patterns and their Influence on Purchasing Behaviour of Travel Products

#### **2016**

- Report on European Tourism Competitiveness in a Transforming Global Marketplace
- ETC-UNWTO Handbook on Marketing Transnational (pan-European) Themes & Routes
- Understanding Growth Potential from Long-Haul Markets
- Evaluation Perception Marketing Promotion Campaign in the United States
- The Chinese Outbound Travel Market and a Netnographic Analysis of Chinese Outbound Travel - Update

#### **2015**

- ETC Study on Consumer Trends
- Digital Appeal of European Destinations

#### **2014**

- European Tourism Portfolio Analysis – Market Share & Origin Market Growth
- Perceptions and Evaluations of VisitEurope.com Content

#### **2013**

- Towards a long-term strategy for cooperative marketing of Europe

2012

- ETC- UNWTO Brazil Netnographic Study

2011

- ETC- UNWTO Understanding Chinese Outbound Tourism

2009

- European Commission's Study on the Competiveness of the EU tourism industry