
REQUEST FOR PROPOSALS

Study on exploring consumer travel attitudes and expectations to drive recovery

Award entity	European Travel Commission
Issuance date	16/12/2021
Deadline for applications	18/01/2022
Estimated starting date	02/2022
Estimated duration	11 months

TABLE OF CONTENTS

1. INTRODUCTION	3
1.1. ABOUT THE EUROPEAN TRAVEL COMMISSION (ETC)	3
2. INFORMATION ABOUT THE PROJECT	3
2.1. PROJECT OVERVIEW	3
2.2. OBJECTIVES	4
2.3. TARGET GROUPS FOR CONSUMER RESEARCH	5
3. DELIVERABLES AND REQUIREMENTS	6
3.1. MINIMUM REQUIREMENTS	6
3.2. TECHNICAL REQUIREMENTS	8
- Style.....	8
- Assignment of rights.....	8
- Reporting.....	8
3.3. DELIVERABLES	8
3.4. IMPLEMENTATION PERIOD	9
5. SUBMISSION OF PROPOSALS	10
5.1. DEADLINE FOR SUBMISSION	11
5.2. QUESTIONS	11
6. AWARD CRITERIA	11
6.1. QUALITY CRITERIA	11
7. FINAL PROVISIONS	13

1. INTRODUCTION

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, 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 ETC.

1.1. ABOUT THE EUROPEAN TRAVEL COMMISSION (ETC)

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

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

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

Further information about ETC can be found on the website www.etc-corporate.org.

2. INFORMATION ABOUT THE PROJECT

2.1. PROJECT OVERVIEW

Tourism's decade-long boom was brought to a complete halt following the COVID-19 outbreak in early 2020. Worldwide tourism declined by 73% in 2020 compared to the previous year, while Europe was down 68% over the same period.¹

European tourism recovery appeared to be underway, supported by improving vaccination coverage, the gradual easing of travel restrictions, the reopening of destinations to fully vaccinated travellers and the EU Digital Covid Certificate. However, lingering risks such as the emergence of

¹ UN World Tourism Organization

new variants and travel restrictions being reimposed continue to hold back the recovery of the tourism sector.

The turbulence brought by the COVID-19 pandemic has changed people's lives in unprecedented ways; the way they live, work, learn, interact, and travel. As the travel industry slowly tries to adapt to the new normal and pave the way to a sustainable and more resilient recovery, consumer shifts brought by the pandemic will have relevant implications on their travel decision-making process and on the wider tourism ecosystem. Recent research has shown that consumer trends driven by the pandemic continue to revolve around travelling closer to home and "staycations", coupled with longer-term stays, shorter booking windows, travellers craving interaction with local communities, "health & hygiene" mindset while travelling, and the pursuit of nature and outdoor experiences, among others. However, research has also demonstrated that consumer attitudes are not stable and depend on external factors, such as the health of the economy, digital advances, the evolution of the pandemic and consequent travel restrictions.

In this regard, destinations are called to respond with measures that prioritise quality tourism² over quantity and adapt their offerings to changes in consumer attitudes driven by the pandemic. Understanding travellers' behavioural trends and expectations in a pandemic world will become paramount to improving customer experiences, while considering the principles of a sustainable tourism recovery and ensuring the sector's resilience in both the short- and long-term.

2.2. OBJECTIVES

- **Knowledge on behavioural trends:** Achieve a better understanding of consumer travel attitudes and behaviours driven by the COVID-19 pandemic and identify long-lasting trends and those that will most likely fade away.
- **Understanding the market:** Identify and provide an overview of the gaps and opportunities in European tourism products and services offered during the pandemic to optimise consumer travel experiences in the short-term.
- **Anticipate travel behaviour:** Examine consumer travel expectations (about travel to and within Europe) for the year 2022 to provide tourism destinations with the necessary insights to adapt their offering to the needs and expectations of potential travellers.
- **Travel outlook:** Provide insights into consumer travel expectations following the summer period 2022 and beyond (2023).

² [Tourism that supports job creation, promote inclusive social integration, protect natural and cultural heritage, conserve biodiversity, generate sustainable livelihoods and improve human wellbeing.](#)

2.3. TARGET GROUPS FOR CONSUMER RESEARCH

Research should be targeted towards carefully selected and qualified participants based on a set of predetermined criteria: location, age, socioeconomic status, level of education, etc. Screening questions will be agreed with ETC during the kick-off meeting. The markets under examination should be from within and outside Europe (potential travellers to Europe, e.g. passport holders). For comparability purposes, the sampling approach among intra-European markets will be based on previous ETC consumer and Trends Watch studies³, which is based on European countries with the highest outbound tourism volumes.

- **European markets:** Germany, the Netherlands, the United Kingdom, France and Italy.
- **Extra-European markets:** US and Russia.

The US and Russia could potentially be replaced by other markets that may gain stronger potential prior to the execution of the project. Additionally, other potential markets could be included and explored (e.g. Australia, Brazil, Canada, China, the GCC, India, Japan, South Korea, etc.) based on their growth potential, the development of the COVID-19 pandemic, travel restrictions and improving consumer confidence. The contractor should allow a level of flexibility for the selection of two the extra-European markets and ensure that primary research can be conducted in these markets. The contractor should, therefore, include in the breakdown of costs, the additional costs for including more markets. The cost for including additional markets (besides the seven required markets mentioned above) should be on top of the cost specified under point 4 *Budget*. The contractor should also suggest a suitable number of participants and rounds of consultations per market and segment⁴ that will allow to obtain the most relevant insights during the execution of the qualitative research.

For each of the markets under examination, ETC would require the sample to have the following characteristics:

1. Respondents will need to be permanent residents of the country the survey is conducted in.
2. Equal distribution of respondents that have travelled internationally (outside their country of residence) during 2020 and 2021 for holiday purposes and those that have not travelled over the same period due to the global pandemic.
3. Respondents from the US and Russia must be open to considering a holiday in Europe in 2022 and 2023 (non-rejecters).
4. Respondents must be the main or joint decision maker for holiday travel in their household.

³ [Research on Monitoring Intra-European Travel](#) and [European Tourism Trends & Prospects \(Quarterly Reports\)](#)

⁴ Segments under review will be discussed and agreed with ETC during the kick-off meeting. More information of potential segments can be found under point 3.1 Minimum Requirements

3. DELIVERABLES AND REQUIREMENTS

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

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

3.1. MINIMUM REQUIREMENTS

ETC intends to commission the production of a study that investigates consumer travel attitudes and expectations ahead of the summer season 2022 and post-summer (and beyond) travel experiences and prospects.

The research outcomes should be based on secondary and primary (qualitative) research methodologies. Findings from the ETC study on [Monitoring Sentiment for Domestic and Intra-European Travel](#) and other relevant ETC studies will be made available to the contractor to pull out trends and support the findings of the primary research. The contractor should propose the most suitable qualitative research methodologies (e.g. in-depth interviews, focus groups, etc.) that will allow to obtain the most relevant insights and achieve the project objectives. The qualitative methods suggested, should be based on carefully selected participants from both within and outside Europe (potential visitors to Europe) and should investigate different groups of segments such as families, couples, First Independent Travellers (FITs), etc.) per market⁵. The contractor should propose the most relevant segments for investigation, which could be reviewed with ETC during the kick-off meeting. See *section 2.3* for more information about the target groups.

The execution of the qualitative research technique should be held virtually and should follow essential ground rules to warrant a successful approach.

The study should be broken down into two different research phases:

- Phase I: February-May 2022 (pre-summer)
- Phase II: September-December 2022 (post-summer and beyond)

The primary research approach should consider two types of travellers for each phase: a) those that have travelled internationally (outside their country of residence) during the pandemic, and b) those that have not travelled internationally during the pandemic. Phase two should look at a group of people different from phase one and an interim report with preliminary results should be provided following the evaluation of results for each phase.

Depending on the targets under examination, the research approach should address, but not be limited to, the following aspects of travel:

⁵ Looking at different segments, separately, within each market under investigation should allow to avoid overrepresentation of a segment when working with larger groups of people.

- Understanding consumer's feelings, perceptions and thoughts about travel within/to Europe during the COVID-19 pandemic.
- Travellers' expectations of a future outbound trip within/to Europe (*What is at the top of their minds? What would they like to see on their next trip?*)
- Travellers' perceptions of past trips during the pandemic (*Did destinations meet their expectations? What would they have liked to have seen in tourism products and services? What would they improve in tourism products and services? What is not yet provided?*)
- What were the reasons, concerns or challenges relating to the COVID-19 pandemic that stopped them from travelling?
- What are the resources tourists need (or would appreciate to have) on a future trip?
- Possible shifts in the stages of the travel consumer journey. E.g., inspiration and information phase (timeline, channels etc.), how much in advance do consumers start thinking of their next trip, where they get inspired, which channels and media are used for information search, etc.
- How will consumers travel in a pandemic world? What (pandemic) travel attitudes do they have now that they did not have before the pandemic? What aspects of their travel behaviour driven by the pandemic are expected to remain in the future? And which ones to disappear in the short-term?
- Attitudes towards travel to European destinations. *What destinations are they open to visit, and what destinations would they avoid? And why?*
- Travel preferences: travel companion, modes of transport, accommodation establishments, tourism facilities, travel period, types of holidays, etc.⁶
- Image of Europe as a tourism destination, including insights on positive and negative aspects relating to the pandemic.
- Personal values when it comes to travel.
- Travel expectations in a post-COVID-19 scenario in 2022 and beyond.

Ultimately, the study should provide conclusions and strategic recommendations for European National Tourism Organisations/National Tourism Authorities (NTOs/NTAs) and Destination Management Organisations (DMOs) on how to capitalise on consumer travel expectations and behavioural changes to improve European travel experiences during pandemic times.

ETC is open to evaluating proposals suggesting a different approach that fulfil the above-mentioned objectives and are in compliance with the budget and requirements specified in this Request for Proposals.

The contractor will be responsible for conducting the research in the appropriate language for each source market studied (and any translating/interpreting that is required).

⁶ Potentially obtained from desk research and ETC research studies.

The more detailed the information provided by the contractor, the better the prospects for their proposal to be approved.

The precise formulation and selection of questions can be finalised after the contract has been awarded. The list of questions quoted here has been deliberately limited in order to stimulate the contractor to develop the questionnaires. A more comprehensive list of questions can be provided by ETC in due course if needed.

3.2. TECHNICAL REQUIREMENTS

- Style

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

- 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 the study as stated below:

- a) to reproduce the Study Materials or incorporate the Task Materials (all deliverables related to the Task) into other material, and to reproduce the Study Materials as incorporated in such other material;
- b) to create and reproduce derivative works from the study;
- c) to distribute copies and display publicly the study, whether independently or as part of other material;
- d) to distribute copies and display publicly derivative works from the study

- Reporting

Regular written progress reports must be provided to ETC.

3.3. DELIVERABLES

The contractor will be expected to include information about the following deliverables and the related costs in their offer:

- A full report in electronic format (Word and PDF) for each phase of the study, with the outcome of the research. The report should include:

- An Executive Summary;
- A clear presentation of the main results of phase 1 and 2 including conclusions and strategic recommendations;
- A detailed description of the applied methodology/ies and contacted experts (as an annex);
- An interim report for phase 1 and for phase 2 within the deadlines specified under point 3.1 Minimum Requirements
- A PowerPoint presentation of main results.
- A press release (2000-3000 characters).
- An infographic of key results for public dissemination.

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

The organisation or individual(s) commissioned should be prepared to present the findings online and in person during exclusive ETC events.

- The organisation or individual(s) should be prepared to organise a webinar to disseminate the main results of the study.
- The organisation or individual(s) should also be prepared to give an oral presentation at an ETC Market Intelligence Group meeting or an ETC General Meeting - depending on the date of delivery.

Travel and accommodation costs for this presentation (1 person) will be covered by ETC.

3.4. IMPLEMENTATION PERIOD

The implementation period of the project is expected to start in **02/2022** and shall not extend beyond **31/12/2022**.

4. BUDGET

The maximum available budget for this project is 40.000 EUR (excluding VAT, and including other taxes, if applicable).

Invoicing will be done on a 20%-40%-40% basis after submission of deliverables only. ETC will first approve that the deliverables are correct and ask the contractor to submit an invoice on the following basis:

- 20% - following the kick-off meeting and on commissioning and approval of the project timeline.
- 40% - following approval of the presentation of results and analysis of the primary research for phase one (N.B. This payment will only be made after all requested changes and adjustments have been implemented and the deliverables are approved by ETC).
- 40% - the final payment will be made only after completion and approval of the presentation of results and analysis of the primary research for phase two and the remaining deliverables (including conclusions and strategic recommendations) by ETC.

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 word meaning and figures.

Proposals should include:

- 1) Brief **company profile**.
- 2) Detailed description of the secondary and primary research methodologies (sample sizes, recruitment of participants, questions, etc.) and information of any subcontracted consultant if the contractor has plans to subcontract a third party to carry out any part of the research.
- 3) **References** to relevant experience in delivering comparable work as outlined in 3.1. *Minimum Requirements* (i.e. case studies or reference list - including project goals, processes, dates and verifiable deliverables).
- 4) **Timeline** for the completion of the project.
- 5) Description of **team credentials**, field of expertise and roles of the people involved in the project.
- 6) Detailed breakdown of the **economic offer**. All prices should be quoted in Euros and exclude VAT (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 execution 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 **18/01/2022** at 10:00am (CET).

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

5.2. QUESTIONS

Questions can be sent in written form via the contact form on the ETC website (<https://etc-corporate.org/study-on-exploring-consumer-travel-attitudes-and-expectations-to-drive-recovery/>) with the subject “Consumer travel attitudes” until **10/01/2022** at 12:00pm (CET).

ETC will provide the answers to all received questions by **12/01/2022** 18:00pm (CET) at the latest.

6. AWARD CRITERIA

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

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

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

6.1. QUALITY CRITERIA

The quality of the proposal is defined as a minimum set of delivered services as described in section “3.1 Minimum Requirements”. Each of these criteria and the relative weights assigned to them are described below.

Quality criteria	Weight
Criterion 1. Company profile and qualifications of the project team 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.	10
Criterion 2. Experience Proven experience in delivering comparable work, including proven experience with the proposed primary methodological approaches.	10
Criterion 3. Project Objectives	20

<ul style="list-style-type: none"> • Complying with the purpose of the project (does the research design meet ETC's goals?) • Complying with the structure outlined in the Request for Proposals (does the proposal correspond to everything ETC is looking for?) • Overall clarity of the proposal. 	
<p>Criterion 4. Methodological approach</p> <ul style="list-style-type: none"> • Quality of the proposed primary research methodology (qualitative methods) including number of participants, rounds of consultation per market and preliminary sources of secondary research. • Approach to collect qualitative data about the source markets under examination, and gain insights into the thoughts, beliefs and attitudes relating to the aspects specified under point 3.1 <i>Minimum Requirements</i>. • Overall approach and deployment of tools and techniques to collect primary research 	40
<p>Criterion 5. Added value</p> <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 tailor-made research. 	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 the European Travel Commission. Any contractual obligation commences only upon signature of the particular agreement between ETC and the contractor.

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

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

Brussels, 16/12/2021

European Travel Commission

Rue du Marché aux Herbes 61

1000 Brussels - Belgium

Tel: + 32 (0)2 - 548 9000

www.etc-corporate.org