

Development and operationalisation of a source market prioritisation framework for the European Travel Commission's destination marketing activities

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Project Brief

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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 contained herein, and any other information obtained by interested parties in connection thereto, is confidential and may not be divulged to third parties or be used for any purpose other than to respond to this project brief without prior consent from the European Travel Commission. 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 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 empower 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 Belgium law.

In line with its mission, ETC carries out a series of marketing and promotional activities aimed at strengthening Europe's image as a sustainable tourist destination in long-haul source markets, while generating opportunities for European DMOs and their partners to promote their destinations in a sustainable and competitive way thanks to economies of scale.

ETC also 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 overview

The European Travel Commission (ETC) is seeking specialist technical support to develop a new data-driven framework for prioritising long-haul outbound travel markets for pan-European destination marketing activities.

Current market selection approaches rely heavily on traditional metrics such as visitor arrivals or expenditure. While valuable, these indicators do not capture the broader value different source markets generate for European destinations, nor do they assess whether these markets can be efficiently reached through promotional activities.

In consultation with its member National Tourism Organisation, ETC has developed an initial concept — the **Value-Targetability Matrix** — which evaluates long-haul outbound travel markets across two complementary dimensions (see Figure 1):

1. Market Value Index

Measures the overall value a source market generates for European destinations through three pillars:

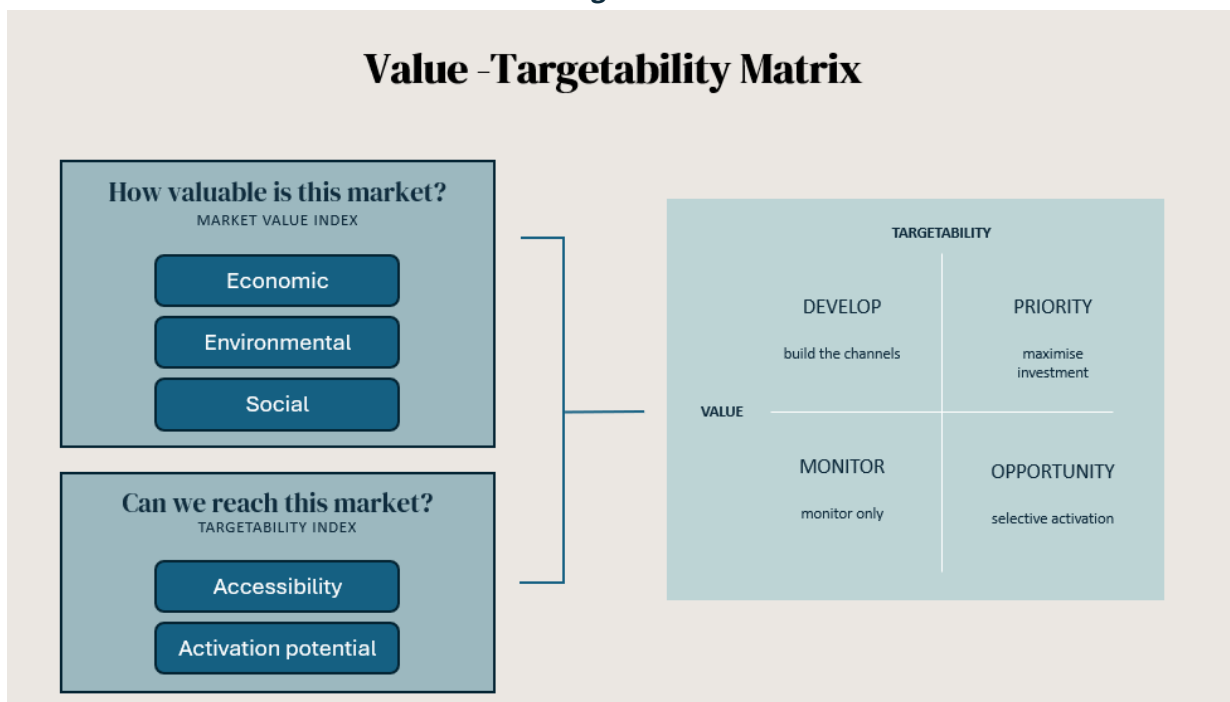
- **Economic value.** The economic benefit that a market generates for European destinations.
- **Social value.** The positive contribution that a market generates for local communities in European destinations.
- **Environmental value.** The environmental efficiency associated with attracting and hosting visitors from a market.

2. Targetability Index

Measures current source market accessibility to Europe as well as ETC's ability to market effectively in the market:

- **Accessibility.** The structural ease with which consumers from a source market can convert travel intent into an actual trip to Europe, based on factors that are external to ETC.
- **Activation potential.** The practical ability to reach and influence a market through marketing activities, based on ETC's own operational capabilities.

Figure 1



Together these two dimensions position each market within a four-quadrant strategic matrix, providing clear guidance for investment decisions.

- **Priority markets**, where both value and targetability are high.
- **Opportunity markets**, where selective activation may unlock further growth.
- **Developing markets**, where value exists but distribution and targeting capabilities need strengthening.
- **Monitoring markets**, which require monitoring rather than active promotion.

Note that the Value–Targetability Matrix presented in this brief should be regarded as a starting point rather than a fixed framework. ETC seeks consultancy support to validate whether the two dimensions and their sub-components are the most appropriate to transform it into a robust, evidence-based and operational model. The contractor may recommend replacing, simplify or introduce additional dimensions provided that the core philosophy of balancing market value with marketing feasibility is preserved.

2.2 Objectives

The contractor will support ETC in developing and implementing a data-driven approach to source market prioritisation for destination marketing activities that can be updated, expanded and applied consistently over time.

The framework will help guide future marketing decisions and ensure that ETC resources are allocated where they can create the most impact. It is also expected to inspire similar models for ETC member destinations.

2.3 Target Groups

ETC destination marketing activities target a global audience of affluent¹ Free Independent Travellers (FITs)² from long-haul markets (outside of Europe), planning leisure trips to Europe and seeking experiences related to nature and the outdoors, cities, culture, history and heritage (segments). The focus is on engaging repeat visitors and those already considering a trip to Europe within the next 12 months, rather than exclusively targeting first-time visitors. Demographic segmentation prioritises the 35-54 age group, followed by 25-34 years old, with no differentiation based on gender.

3. Requirements and deliverables

The contractor must fulfil the minimum requirements outlined in the following sections. Any essential items necessary for the project's successful execution, even if not explicitly mentioned, should be considered included in the list of minimum requirements.

Proposals that do not meet these requirements will be excluded from further evaluation.

¹ Households with above average disposable income.

² A Free Independent Travellers (FITs) is an individual or a small group of individuals (<10) who travel independently rather than as part of an organised group. FITs generally plan and arrange their travel online by themselves, although they may still consult a tour operator or advisor, given their particular knowledge and confidence required to plan a holiday to an overseas destination.

3.1 Methodological approach

Starting from the conceptual **Value–Targetability Matrix** outlined in section 2.1, the contractor will support ETC in designing and implementing a source market prioritisation for ETC’s destination marketing activities. The following phases in project implementation are foreseen:

Phase 1 – Review and refinement of the framework

The contractor shall review the proposed Value–Targetability Matrix and recommend improvements to:

- Overall conceptual framework
- Validate the conceptual model against existing academic literature and industry best practice
- Definitions
- Dimensions
- Develop a transparent scoring and weighting methodology

The final methodology should be transparent, reproducible and easily explainable to stakeholders.

Phase 2 – Indicator development

For each dimension, the contractor shall identify appropriate indicators. The contractor shall assess the proposed set of indicators (see Table 1) and where appropriate, recommend additions, removals or replacements to improve the robustness, relevance and practicality of the framework. Any proposed changes shall be clearly justified based on relevance, robustness and practical applicability. For any newly proposed indicators, the contractor shall demonstrate that reliable and sufficiently comparable data can be obtained across the source markets. The overall assessment should consider both the analytical value of each indicator and the long-term availability and maintainability of the underlying data.

Table 1

Market Value			Targetability	
Economic	Social	Environmental	Accessibility	Activation Potential
Market size	Market reputation	Estimated emissions per night stayed	Visa requirements	European NTO representation
Disposable income	Repeat visitation	Estimated emissions per euro spent	Passport ownership rate	Digital audience size
Average visitor expenditure per trip	Cultural engagement	Average travel distance	Direct air connectivity	Social media penetration
Average length of stay	Local spending share	Sustainable travel attitudes	Seasonal connectivity	Marketing costs
	Respectful behaviour		Outbound travel intention	Investment risk

	Seasonal distribution	Participation in low-carbon activities	Online Travel Agency (OTA) coverage	
	Geographic dispersion			
	Travel purpose			
	Luxury travel propensity			
	Multi-country travel propensity			

Phase 3 – Data assessment and source markets

For each proposed indicator, the contractor is expected to use existing publicly available or commercially available datasets. The contractor should indicate a preferred data source and, if possible, an alternative data source for each proposed indicator. Possible sources may include UN Tourism, IATA, Eurostat, ETC research, inter alia. Conducting new primary research is outside the scope of this project.

Where commercial datasets are recommended, the contractor should identify the provider, describe their suitability and estimate licensing costs. Acquisition of commercial datasets will be agreed separately with ETC where necessary. The contractor is not expected to bear the costs of acquiring commercial datasets.

For each proposed indicator and data source, the contractor shall assess data quality, including completeness, reliability, comparability across markets, update frequency and any licensing or accessibility constraints, and shall document any limitations and proposed mitigation measures.

The data must cover at least the following long-haul outbound travel source markets:

- Australia
- Brazil
- Canada
- China
- GCC (as one market)
- Japan
- India
- South Korea
- United States of America

Additional long-haul markets that can be considered for the model at the present stage will be a plus. In any case, the contractor should ensure that additional source markets, new indicators or revised strategic priorities can be incorporated into the framework without requiring a complete redesign.

ETC will provide the awarded contractor access to previous market research, studies and existing relevant data sources, which may prove useful when conducting this project such as the *ETC NTO Budget Survey, Assessment of*

responsible Travel Practices (baseline year), etc. However, this project should provide new and unpublished content and advance ETC's knowledge.

Phase 4 – Model implementation

In this phase, the contractor shall implement the agreed framework by applying the proposed methodology to all selected travel markets. The contractor shall collect and analyse the required data, apply the agreed methodology to calculate the relevant scores, weights, and indices, and develop the final Value–Targetability Matrix. The contractor is expected to adopt appropriate quality assurance procedures to ensure the robustness and reliability of the results.

Phase 5 – Strategic market prioritisation

The contractor shall deliver a final matrix of long-haul outbound travel markets as well as brief market profiles for each evaluated market, summarising its performance across the matrix, including the overall scores, key strengths and weaknesses, and strategic positioning within the matrix together with recommendations for future marketing investment. The contractor must also provide recommendations for future maintenance and updates.

The final methodology shall be fully documented and designed so that ETC can maintain and update the framework independently after project completion. The contractor shall provide full documentation of the final model, including all underlying calculations, datasets, methodological decisions, ensuring that the methodology, calculations and results are fully transparent, reproducible and maintainable by ETC without further support.

3.2 Deliverables

The contractor shall deliver one report in electronic format (PDF or PowerPoint) including the following:

1. Detailed explanation of the methodological approach
2. Complete scoring and weighting methodology
3. Indicator catalogue
4. Data source inventory
5. Value–Targetability Matrix for all evaluated markets
6. Market profile for each evaluated market
7. User guide for future maintenance and updates, providing practical instructions on how to update the underlying data, incorporate new markets or indicators, modify the weighting methodology where required, recalculate the results, and maintain the framework over time.

The report should be written in British English. The 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 contractor shall also deliver a dashboard, Excel-based model or similar tool (to be agreed with ETC) that allows ETC to:

- Update data
- Automatically recalculate scores

- Modify weights
- Visualise the matrix
- Export results

Finally, the contractor will be required to deliver a final project presentation to the staff of ETC.

3.3 Technical requirements

The deliverables should adhere to the following technical requirements:

Publicity

The contractor is required to give prominence to the European Travel Commission logos on all project deliverables and related communication materials

Logo of the European Travel Commission



The guidelines for the use of the logo will be shared with the awarded contractor.

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 with a worldwide, royalty-free, non-exclusive, perpetual (for the duration of the applicable copyright) license to exercise the Intellectual Property Rights in the project deliverables as stated below:

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

Project Management

The contractor must provide a dedicated project management team with sufficient resources and expertise to ensure the successful delivery of all services throughout the contract period.

The contractor shall designate a dedicated Project Manager who will serve as ETC's primary point of contact and be responsible for coordinating all project activities, managing timelines, monitoring progress, identifying and

mitigating risks, and ensuring the timely delivery of all agreed outputs. The Project Manager must be available to communicate with ETC by email, telephone and online meetings as required.

The contractor shall establish an appropriate project governance structure that ensures **continuous collaboration with ETC throughout the project lifecycle**. ETC should not only be informed of progress but also actively consulted on key methodological decisions and deliverables. The contractor is expected to engage ETC at all major project milestones, including, but not limited to:

- Validation and refinement of the proposed market segmentation framework and methodology;
- Selection of indicators, data sources and weighting methodologies;
- Review of preliminary findings, scoring models and market classifications;
- Validation of draft deliverables before finalisation;
- Discussion and agreement on any proposed methodological changes arising during the project.

The contractor shall provide regular progress updates, including written status reports and scheduled project meetings, outlining completed activities, upcoming tasks, key decisions, risks, issues requiring ETC input, and any deviations from the agreed work plan.

The contractor must demonstrate proven expertise in tourism economics, destination marketing, market segmentation, consumer behaviour analysis, statistical modelling and the use of tourism-related data sources. Previous experience delivering similar projects for European tourism organisations, destination marketing organisations (DMOs), national tourism organisations (NTOs), or other international tourism bodies will be considered an advantage.

3.4 Implementation period

The implementation period of the project is expected to start in **August 2026** and shall not extend beyond **end of September 2026**.

4. Budget and terms of payment

The maximum available budget for this project is **EUR 18,000** (eighteen thousand euros) excluding VAT³ and including other taxes, costs and fees.

Invoicing will take place upon completion of the project and formal approval by ETC of all deliverables. ETC will review and approve the deliverables before requesting the contractor to submit the corresponding invoice. Invoicing and payments to the contractor will be made in Euros.

The payment from ETC to the contractor may be subject to reduction in the event of any breach of the contractor's obligations. Breaches may include but are not limited to failure to deliver the required deliverables or incorrect use of the ETC logo.

³ Please find here the definition of VAT: https://taxation-customs.ec.europa.eu/what-vat_en#:~:text=Value%20added%20tax%20is&text=a%20consumption%20tax%20because%20it,the%20production%20and%20distribution%20chain

5. Submission of proposals

Proposals must be clear, concise (**not exceeding 20 pages in total**) and **written in English**. The proposal structure is open, but it must provide all information relevant to the assessment of the proposal by elaborating on each of the award criteria (see 6. Award criteria) and include, at minimum, the following:

- 1) Brief **company profile** describing the services that the contractor provides.
- 2) Description of the **project team**, their field of expertise and roles in the project implementation.
- 3) Detailed **description of the methodology** to be used for delivering all services outlined in 3. *Requirements and deliverables*. The proposal should explain how the proposed methodology will be applied to operationalise the initial framework, including the approach to data collection, scoring, validation, maintenance, and, where appropriate, refinement of the model. Tenderers are encouraged to propose evidence-based improvements to the initial framework, clearly explaining the rationale for each recommendation and its expected impact on the robustness, quality, and usability of the final outputs. The proposal should also describe the proposed project management arrangements, including how ETC will be involved throughout the implementation process, key decision points, and opportunities for review and validation.
- 4) At least **two references** to relevant experience in delivering comparable work. For each reference, the contractor must use the model reference form (**Annex 1**) which must be filled in completely and correctly.
- 5) **Timeline** for the completion of the project
- 6) **Economic offer**. The proposal must present a detailed breakdown of the budget. The economic offer should include all costs following the scope of work of the project (including third party costs if any). All prices should be quoted in Euro and exclude VAT and other taxes which may be recoverable by ETC (being a private VAT-registered entity based in Belgium) and including other taxes, if applicable.

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.

Note that all potential contractors shall submit only **one proposal** per Project Brief. A contractor who submits more than one proposal will cause all the contractor's proposals to be rejected.

5.1 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.

5.2 Deadline for submission

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

Proposals must be received by **27 July 2026** at 23:59 (CEST).

The proposals must be valid for two months after the submission deadline.

5.3 Questions

Questions about this Project Brief must be sent in written form via the contact form on the ETC website (<https://etc-corporate.org/contact/>) with the subject “RFP Source market prioritisation framework” until **23 July 2026** at 14:00 (CEST).

ETC will have provided the answers to all received questions by **23 July 2026** 18:00 (CEST) at the latest on the page <https://etc-corporate.org/contact/rfp-source-market-prioritisation-framework-q-a/>.

6. Award criteria

The proposals should elaborate on all award criteria to score as many points as possible. The mere repetition of mandatory requirements without going into details will only result in a lower score.

The contract will be awarded on the basis of the contractor’s compliance with the requirements set out in this document. The award criteria used will also include, among others:

- The most economically advantageous proposal, namely the project that offers the best value for money (30%);
- The level of clarity, quality, relevance and feasibility of the proposed methodology, deliverables and timeframe (50%);
- The credentials of the project management team and the proven relevant experience in delivering comparable work and services (20%).

7. Final provisions

This Project Brief 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 Project Brief as well as to cancel this project, either partially or totally. In the event of cancellation of this Project Brief, 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.

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

Brussels, 13 July 2026

European Travel Commission

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Annexes

Annex 1 – Reference form

Name of the project:	
Scope and objectives of the project:	
Total value of the contract (in euros):	
Period of execution:	
Place of execution:	
Description of the work performed by the contractor and main results:	
Client	
Name:	
Registered address:	
Website:	
Attached certificate of good execution:	YES / NO
Contact person at the client	
Name:	
Position:	
Phone:	
E-mail:	

* All fields in the form are required.

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