

# Framework for Monitoring Travel Sentiment in Long-Haul Markets

Award entity	European Travel Commission (ETC)
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Estimated duration	3 years

# Request for Proposals

## Framework for Monitoring Travel Sentiment in Long-Haul Markets

### Contents

<b>1. Introduction .....</b>	<b>2</b>
1.1 About the European Travel Commission (ETC) .....	2
<b>2. Information about the project .....</b>	<b>2</b>
2.1 Project Background .....	2
2.2 Objectives.....	3
2.3 Target groups.....	3
<b>3. Deliverables and requirements .....</b>	<b>4</b>
3.1 Deliverables.....	4
3.2 Minimum Requirements .....	4
3.3 Technical requirements.....	6
3.4 Procedure to place orders .....	7
3.5 Implementation period .....	7
3.6 Budget and terms of payment .....	7
<b>4. Submission of proposals .....</b>	<b>8</b>
4.1 Use of artificial intelligence .....	9
4.2 Deadline for submission .....	9
4.3 Questions .....	9
<b>5. Awarded criteria .....</b>	<b>9</b>
<b>6. Final provisions.....</b>	<b>11</b>

# 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 intents and preferences of travellers in long-haul markets 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.

**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 the property of ETC at all times.

## 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 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 Belgian law.

Moreover, within the scope of its mission, ETC collaborates 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](http://www.etc-corporate.org).

# 2. Information about the project

## 2.1 Project Background

In 2014, the European Travel Commission, the European Tourism Association (ETOA), and the Eurail Group jointly launched an initiative to monitor travel sentiment in Europe's most relevant overseas travel markets, supplementing existing statistics with forward-looking information.

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Conducted three times per year, the Long-Haul Travel Sentiment Survey and Index<sup>1</sup> captures people's intentions to travel outside their region of residence, their motivations and barriers to travel, and the key characteristics of their trips.

For more than 10 years now, the survey results have helped ETC, its members, and partner organisations to look further into the future and better prepare for changes. In a climate of geopolitical and economic instability, safety and security worries, and environmental concerns, the initiative provides the necessary foresight to better understand the global market dynamics and monitor new trends from those outbound markets, which are at once relevant and volatile.

This Request for Proposals (RfP) aims to conclude a Framework Service Agreement with an experienced consultant (hereinafter referred to as the contractor) to support ETC in the continuation of this initiative by collecting data from prospective travellers in overseas markets for Europe - Australia, Brazil, Canada, China, Japan and the United States. The collected information will support ETC in generating valuable insights into long-haul travellers' short-term travel intentions and support its marketing initiatives.

**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 citizens in key overseas markets for Europe. The project shall monitor people's travel sentiment along with their preferences, including types of destinations and experiences, holiday periods, envisaged transport services, daily budgets, concerns relating to travel to Europe, etc. Findings should support NTOs in better understanding the sentiment for long-haul travel, considering current challenges and potential future obstacles that may arise globally.

The project should be executed in different research waves to reflect the evolving travel sentiment and preferences of long-haul travellers.

Intentions should be measured regarding long-haul travel in general and specifically to Europe. Measuring the intention to travel domestically is outside the scope of this project.

## 2.3 Target groups

As minimum, the project shall examine the travel intentions of citizens from the following extra-European source markets - Australia, Brazil, Canada, China, Japan and the United States.

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<sup>1</sup> Results from previous research waves can be found on the ETC Website under [Long-Haul Travel Barometer Reports](#).

## 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 and 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.
- Structured data files in Excel with detailed survey results for the total sample, breakdown per market and results from cross-tabulation of specific questions.
- Executive Briefing providing a concise, insight-driven overview of the most relevant developments emerging from each research wave.
- Development and update of iFrames for easy display of the survey's results and integration into the ETC's Executive Dashboard.

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) to enable speedy analysis of results.

### 3.2 Minimum Requirements

- a) The contractor shall collect data in waves - one every four months - to reflect the evolving travel sentiment and travellers' changing preferences and behaviours.
- b) The research waves are conducted three times a year- in April, August, and December- and provide information about travel intentions for the next four months. The wave conducted in December is the only exception, as it covers two travel horizons - four months (January-April) and twelve months (January - December).
- c) The research must cover the following source markets: Australia, Brazil, Canada, China, Japan and the United States.

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d) 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, including measurement of the travel intention, definition of regions, information about the questionnaire, the sample and the data collection schedule, is described in detail in Methodological Note (Annex A). The contractor may also propose methodological innovations, provided these do not compromise comparability with historical data.

e) 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. 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.

f) 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.

g) Upon completion of the data collection for each wave, the contractor shall provide structured data files in Excel with detailed survey results, including:

- Tab with information on the sample profile of each market.
- Tab with detailed results on the travel intention among the total sample and breakdown per market.
- Tab with the results of all other questions among the total sample and break down per market, clearly indicating respective sample sizes.
- Indication of the significant year-on-year differences (at a confidence level of 95%) for all questions where data is available for the total sample and per market.
- Indication of the significant differences (at a confidence level of 95%) between individual markets against the total sample, for all questions.
- Cross-tabulations of selected questions among the total sample and per market
- A longitudinal file which allows a comparison of travel intention and destination preferences over time per market.

*ETC will provide the awarded contractor with examples of data files from previous research waves. Those files could be replicated or not.*

h) After each data collection, the contractor should prepare an Executive Brief that provides a concise, insight-driven overview of the most relevant developments emerging from each wave. Rather than summarising all results equally, the contractor shall prioritise significant year-on-year changes and meaningful differences across markets, emerging behavioural patterns, and findings with strong strategic or communication relevance. The Executive Brief should help ETC identify the key narrative(s), notable findings, and potential story angles to be used for the report and PR.

- i) The contractor should also develop iFrames with the results of selected survey questions (approximately five questions) for easy integration into ETC's Executive Dashboard. The consultant should update the data for each wave while keeping the design and the IFrame's URL unchanged.
- j) The time to deliver all materials per wave (i.e. data collection, data files, Executive Brief and iFrames update) should not exceed 4 weeks. 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 (Excel data files, executive briefing, press releases, iFrames, 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/](https://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;
- d) to distribute copies and display publicly derivative works from the project materials.

#### Reporting

Regular written progress reports must be provided to ETC.

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### 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 June 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. ETC foresees that the contractor will be asked to conduct at least two research waves during the period June 2026 – June 2029.

### 3.6 Budget and terms of payment

The total maximum contract value for the entire term of the Framework Agreement is 200.000 EUR (two hundred thousand), excluding VAT and including all taxes, fees, charges and costs.

The maximum number of waves that can be conducted under this Framework Agreement is 7 (seven).

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.

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## 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) Detailed description/visual example of the structured Excel data files to be shared with ETC.
- 6) Sample Executive Brief (1 page) with dummy data to demonstrate the applicant’s analytical capacity, critical thinking, and ability to translate the survey data into easily digestible, engaging content as described in section 3.2 of this tender.
- 7) Description of the approach and tools used to develop and share the iFrames.
- 8) Detailed timeline for the completion of the project, including the timings needed per phase, i.e. survey revision and update, data collection phase, preparation of the data files, preparation of the Executive Brief and the iFrames. ETC foresees at least two rounds of revision, if necessary, on the following deliverables under each wave - the Executive Briefing, structured data files, and iFrames.
- 9) Detailed breakdown of the economic offer by completing Annex B, including pricing for: (i) all core tasks and deliverables within the project scope; (ii) optional tasks and deliverables that may be commissioned by ETC for certain waves; and (iii) Add-ons (non-mandatory) - any additional services proposed by the contractor that could further enhance the project’s value.<sup>2</sup> All prices should be quoted in Euro, exclude VAT<sup>3</sup> 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 requirements.
- 10) 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

<sup>2</sup> Applicants can provide pricing for additional services/deliverables that could enhance the strategic, analytical, communication or commercial value of the project. These add-ons should be clearly described and priced in Annex B - separately from the core and optional deliverables and tasks. The add-ons are not mandatory and will not be taken into account in the 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.

<sup>3</sup> [https://taxation-customs.ec.europa.eu/what-vat\\_en](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 **10/06/2026** 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 Long-Haul Markets" until **27/05/2026** at 23:59 (CEST).

ETC will provide the answers to all questions received by **1/06/2026** at **23:59 (CEST)**.

# 5. Awarded 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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**Final score = [(lowest price / proposal price) x 100 x 0.4] + (quality score x 0.6)**

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## 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.

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

0 Not available/not provided	The application fails to address the criterion or cannot be assessed due to missing or incomplete information.
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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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