

Marketing Strategies and Measurement Techniques for National Tourism Organisations

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Project Brief

Marketing Strategies and Measurement

Techniques for National Tourism Organisations

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1. Introduction

This Project Brief forms part of ETC's 2026 Research Programme and aims to help ETC members adapt their marketing strategies and measurement practices to a rapidly changing landscape.

It sets out ETC's objectives and minimum requirements. Proposals should demonstrate a clear understanding of both and may include additional ideas that would strengthen the project's value.

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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 the law of Belgium.

Moreover, within the scope of its mission, ETC regularly works 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.

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2. Information about the project

2.1 Description

Marketing has long been a core function of National Tourism Organisations (NTOs), traditionally focused on promoting destinations and communicating their appeal. Its role has since broadened: marketing can influence the types of visitors a destination attracts, the distribution of demand across places and seasons, and how visitors engage with destinations. The channels and techniques through which this happens have also expanded rapidly, from paid media and social platforms to B2B trade, co-operative marketing, sustainability-focused campaigns and, increasingly, AI-driven discovery. However, measurement practices have not kept pace, and many NTOs still rely mainly on communication metrics for a function that now contributes to wider organisational objectives.

At the same time, governments and public funders often judge NTO performance against aggregated outcomes – the number of visitor arrivals, overnight stays, and spending – which are shaped as much by economic conditions, geopolitics, weather, and transport capacity as by marketing itself. Meanwhile, artificial intelligence is increasingly reshaping how travellers discover destinations online. As AI-generated answers reduce reliance on traditional search and destination websites, conventional indicators such as website visits and click-through rates are becoming less reliable proxies for marketing effectiveness. Taken together, these developments expose a growing disconnect between the outcomes against which NTOs are held accountable and the metrics available to demonstrate marketing's contribution.

Against this backdrop, ETC will commission a study of how the tourism marketing landscape is evolving and what this means for NTOs. The study will identify relevant and emerging marketing approaches and develop a practical measurement framework to help NTOs assess performance, adapt their strategies and demonstrate the contribution of public investment in destination marketing.

2.2 Objectives

This project has three main objectives

- **Understand the shift:** Examine how marketing and its measurement are evolving within tourism and, where relevant, other industries. Particular attention should be given to AI and its implications for NTOs' marketing activities.
- **Recommend future-ready marketing approaches** - Identify practical strategies and techniques that NTOs can adopt, adapted to different organisational contexts, capacities and resources.
- **Develop a practical measurement framework** - Create a framework that links marketing activities to outputs, outcomes and wider economic, environmental and social impacts, while distinguishing between what marketing can directly influence and what it can only contribute.

3. Requirements and deliverables

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

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

3.1 Minimum Requirements

The requirements below set out what the project must achieve rather than prescribing a methodology. Applicants should propose the methodology they consider most effective and may suggest additional outputs beyond those listed. Given how quickly artificial intelligence is developing, contractors are also invited to propose the extent to which AI should feature in this project – both as a subject of the research and as a tool applied within the project's own methodology and outputs.

The contractor is expected to:

- 1) Carry out desk research into how marketing and its measurement have evolved within tourism and, where relevant, other industries over the past two years, including what AI-driven changes in traveller search, discovery and engagement mean for destination marketing practice.
- 2) Carry out a consultation among ETC's member NTOs to understand how their current marketing strategies, techniques and measurement practices compare against this evolving landscape, and to identify where they are struggling to adapt - both in the marketing approaches they use and in how they measure performance. ETC will facilitate access to its members and support the distribution of the consultation.
- 3) Based on the desk research and consultation with ETC's member NTOs, assess which current marketing strategies and tactics remain fit for purpose and which need to change and recommend forward-looking strategies and techniques - grounded in international best practice - that NTOs can practically adopt in response to this evolving landscape. Recommendations should:
 - a. Cover different types of marketing activity- including paid media, social, B2B trade, co-operative marketing, sustainability-aligned targeting and AI-driven discovery, etc.
 - b. Be tiered or adapted to reflect NTOs' different organisational contexts, capacities and resources, so they remain usable regardless of an NTO's size or analytical maturity.
- 4) Develop a measurement framework that captures marketing's contribution to destination development across economic, environmental and social dimensions. The framework could draw on existing models and approaches or develop new ones. The framework should:
 - a. Link each recommended strategy to the techniques used to deliver it, and each technique to the KPI(s) that would show whether the technique worked in practice.
 - b. Distinguish clearly between the results of a marketing activity (its immediate effect, such as reach or campaign recall) and its impacts (the resulting shift in behaviour, such as travel intention or

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visitor arrivals), and show how the two connect, e.g. campaign recall (result), shift in stated travel intention for the same audience (impact).

- c. Indicate, for each type of marketing activity or objective covered, the minimum set of KPIs an NTO would need in order to evaluate it, and which further KPIs add depth where resources and data allow¹. The contractor is expected to propose the logic underpinning the framework's structure and scope and may propose an alternative to the above.

Considered beneficial: Where feasible, propose indicative thresholds or target ranges for the performance of the indicators.

- d. Be accompanied by a clear, practical guide that allows NTOs to start using it straight away without needing extensive prior expertise.
- 5) Develop a practical tool that allows NTOs to input their own data against the indicators in the framework and obtain calculated, interpretable results. Whatever format is proposed for the tool (Excel, online dashboard, etc.), ETC and its members must be able to maintain and update the tool independently, without ongoing reliance on the contractor.

3.2 Deliverables

The contractor is expected to provide the following deliverables in their offer:

- **Report** (electronic format, PDF) – a single, comprehensive report bringing together the project findings and outputs. At minimum, it should include:²
 - an executive summary
 - a detailed description of the methodology used
 - the findings of the desk research and the consultation with ETC's member NTOs
 - recommendations for marketing strategies and techniques
 - the measurement framework, together with a step-by-step guide to applying it

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 (in both English and editing) to enable speedy publication without further editing.

- **KPI Calculator** – the practical tool described under 3.1(5), in the format proposed by the contractor, supplied in the proposed format together with editable source files, technical documentation, instructions and illustrative sample data.

¹ Each KPI should include its definition, data source, method of calculation and frequency of measurement.

² The exact structure of the report is not prescribed by ETC and will be agreed upon with the contractor during the project.

- **Presentation of results** – the contractor should be prepared to present the study’s findings and the measurement framework to ETC members, both online (e.g. a webinar) and in person at an ETC meeting, depending on the date of delivery.

Travel and accommodation costs for the in-person presentation (one person) will be covered by ETC and should not be included in the economic offer.

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.

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 the project deliverables publicly, whether independently or as part of other material;
- d) to distribute copies and display publicly derivative works from the project deliverables

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3.4 Implementation period

The project is expected to be implemented between **September 2026** and **January 2027**.

4. Budget and terms of payment

The total maximum budget for the project is **40.000 EUR** (excluding VAT and including other taxes if applicable).

ETC will first ensure the deliverables are correct and ask the contractor to submit an invoice. Invoicing will be done in three instalments:

- 10% following the kick-off meeting and on commissioning and approval of a detailed project timeline;
- 40% following approval completion of desk research, ETC Members' consultation and synthesis of results
- 50% after completion and approval of Framework, the KPI calculator, and presentation of results.

N.B. All payments will only be made after all editing requests made by ETC have been implemented and the deliverables are approved by ETC.

ETC may reduce payment where the contractor has not fulfilled its contractual obligations, including failure to deliver an agreed output or to meet the required quality standard. Any reduction will be proportionate to the unfulfilled obligation and applied in accordance with the contract.

5. Submission of proposals

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

Proposals should include:

- 1) Brief **company profile**
- 2) Short description of **project team**, field of expertise and roles of those involved in the project.
- 3) References to relevant experience in delivering comparable work as outlined in section 3.1 "Minimum Requirements" (i.e. case studies or reference list - including project goals, processes, dates and verifiable deliverables, links if available).
- 4) A detailed **description of the proposed methodology** to be used for delivering all services outlined under sections 3.1 Minimum Requirements and 3.2 Deliverables of this project brief. This should include, but not be limited to, the approach to desk research and synthesis of findings; consultation

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with ETC members (including its timing, format and purpose); logic and structure of the measurement framework; development and validation of the measurement framework; prioritisation and justification of the proposed strategies, techniques and KPIs within the project's scope and budget; development of a practical tool (e.g. a KPI calculator) enabling NTOs to apply the framework.

- 5) A short, **worked example** (maximum 1 page) applying the proposed approach to a single marketing activity of the applicant's choosing. The example should demonstrate how the applicant would translate a marketing strategy into a specific technique, identify the indicators used to measure its performance, distinguish between immediate results and longer-term impacts, and explain which indicators represent the minimum evidence required to assess success and which would provide additional depth where available. The example is illustrative only and does not need to be based on real data; its purpose is to demonstrate the applicant's understanding of the measurement logic underpinning this project
- 6) The proposal should reflect on the **project management arrangements**, including how ETC will be involved throughout the implementation process, key decision points, and opportunities for review and validation.
- 7) **A detailed timeline** for the completion of the project
- 8) **Economic offer.** The proposal must include a detailed budget breakdown. The economic offer should include all costs within the project's scope of work (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 include 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 have all their proposals 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 in 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 **25 August 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 “Marketing Strategies and Measurement Techniques for NTOs” until **13 August 2026** at 23:59 (CEST).

ETC will have provided the answers to all received questions by **18 August 2026** at 23:59 (CEST), at the latest on the page https://etc-corporate.org/msmt_qna/.

6. Award criteria

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

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

Final score = [(lowest price / proposal price) x 100 x 0.3] + (quality score x 0.7)

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 assigned relative weights is described below.

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

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<u>Quality criteria</u>	<u>Weight</u>
Criterion 1. Company profile and qualifications of the project team • The extent to which the credentials, qualifications, fields of expertise, roles and responsibilities of the proposed project team are suitable for delivering this project - including expertise in tourism marketing, destination management, marketing analytics and sustainability-related indicators. • Proven experience delivering comparable work, including experience with the proposed methodological approach and in engaging with NTOs or other public-sector tourism bodies	15%
Criterion 2. Project goals • Complying with the purpose of the project. • Complying with the structure outlined in the Project Brief. • Overall clarity of the proposal.	20%
Criterion 3. Methodological approach • Quality and rigour of the proposed desk research and primary research methodology, including the approach to consultation with ETC members. • Approach to prioritising and justifying the selection of strategies, techniques and KPIs within the project's scope and budget. • Overall approach to building and validating the measurement framework. Quality of the worked example. • Approach to developing the practical tool that will allow NTOs to apply the framework. • Quality of proposed deliverables.	50%
Criterion 4. Added value • 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, including in responding to the challenges AI poses for marketing measurement. • Level of flexibility to tailor the approach to NTOs' differing needs and capacities.	10%
Criterion 5. Timeline The project timeline is detailed and in accordance with this Project Brief.	5%

Final provisions

This Project Brief is in no way binding on the European Travel Commission. 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 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.

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