ETC & UNWTO HANDBOOK ON MARKETING TRANSNATIONAL TOURISM THEMES & ROUTES

Invitation to Tender

1. Introduction

The European Travel Commission (ETC) and the World Tourism Organization (UNWTO) intend to commission a handbook on marketing transnational tourism themes and routes. In recent years, the development of tourism themes and routes has gained prominence with the key aim of bundling services and attractions under a unifying subject and for promotion purposes. These themes bridge the gap between a destination’s tangible and intangible features and are designed to appeal to specific visitor segments interested in gathering unique experiences on topics such as culture, history, heritage, nature, sports, gastronomy, religion or health. In a transnational context, themed tourism products enhance synergies, strengthen cross-border collaboration and offer visitors an immersive experience through the kaleidoscopic offer available across different countries in Europe and in other regions around the world.

With this handbook, ETC and UNWTO’s primary interest is to achieve a deeper understanding of existing tourism themes and tourism routes, with a focus on transnational products. Aspects related to the development, management and promotion of current and potential transnational tourism themes and routes should be thoroughly investigated, so as to provide the sector with a comprehensive and clear guide on this topic. This handbook should also provide practical guidance on the implementation of thematic tourism marketing approaches. The project is meant to deliver a full report for the benefit of the members of the commissioning organisations (for ETC see http://etc-corporate.org/members and for UNWTO see www2.unwto.org/members/states) and the tourism sector as a whole. Results will also feed into the ETC long-term strategy ‘Destination Europe 2020’ and contribute to the further development and promotion of its VisitEurope.com Internet portal (see http://visiteurope.com).

2. Purpose of the Handbook

With this handbook, ETC and UNWTO intend to shed light on the landscape of tourism themes and themed tourism routes in Europe and worldwide. By tourism theme ETC and UNWTO understand a topic, common to more than one country or region, that can be exclusively associated with the values and natural or man-made resources typical of a world region, such as Europe, and is suitable to tie-up tourism products. ETC and UNWTO understand a themed tourism route or circuit as a cluster of tourism services (e.g. attractions, accommodation, transportation, etc.) linked with immaterial values and proposed travel experiences (culture, heritage, nature, activities, gastronomy, etc.) to form a distinct tourism product encompassing more than one tourism destination.

1 Following this approach, a tourism route doesn't necessarily imply a physical road or trail.
The main objectives of this handbook is to (i) gain a thorough understanding of the development, management and promotion of transnational tourism routes and to (ii) provide practical guidance for National Tourism Organisations/Administrations (NTOs/NTAs) and Destination Management Organisations (DMOs) on how to market and promote destinations through transnational thematic tourism experiences and products.

ETC and UNWTO envisage the handbook to address the following three objectives:

- Provide a common framework for transnational tourism products;
- Provide a portfolio of best practice examples;
- Develop a toolkit for the marketing and promotion of transnational tourism themes and routes.


Based on the aforementioned objectives, ETC and UNWTO envisage that this handbook should be deployed in two phases. In phase 1, the consultant should gather information from a wide range of secondary sources (studies, statistics, websites, etc.) as well as primary sources (e.g. interviews and/or surveys). In phase 2, the consultant will build on these findings and ETC and UNWTO would expect that guidance provided by the handbook will correspond to “state of the art” approaches in the marketing of tourist destinations and tourism products.

Tentatively the final handbook should cover the following areas:

1. An introduction to the landscape of transnational tourism themes and routes, which shall serve further analysis, aiming at:
   
   1.1 Providing a portfolio of selected transnational tourism themed routes in Europe and worldwide, with links to relevant online material. Such portfolio should be based on a selection through comparable criteria developed by the consultant. It could expand on already existing definitions of established organisations (e.g. Council of Europe Cultural Routes) and make an attempt to capture the key characteristics of the myriad of transnational themed tourism products currently available. The search should keep in mind aspects relevant to National Tourism Organisations/Administrations (NTOs and NTAs) and Destination Management Organisations (DMO) (e.g. management and marketing), to feed the second phase;
   
   1.2 Mapping existing pan-European tourism themes that could foster collaboration and development of tourism promotion and routes on a pan-European level;
   
   1.3 Compiling a range of relevant case studies of successful transnational themed routes on the following areas of interest:
   
   - the initiation and development of transnational tourism themes and routes;
   - the management and governance of transnational tourism themes and routes;
   - the promotion of successful transnational tourism themes and routes, with a focus on the evaluation of their performance.

2 The Council for Cultural Co-operation (CDCC) formulates the following definition: “The term European Cultural Route is taken to mean a route crossing one or two more countries or regions, organised around a theme whose historical, artistic or social interest is patently European, either by virtue of the geographical route followed or because of the nature and/or scope of its range and significance”.

3 Case examples should be consistently structured to support cross-comparison.
2. An extensive **collection of practical tools and techniques** focusing on the experience-centred marketing and promotion of transnational tourism products, including:

2.1 A detailed investigation of different marketing approaches and strategies deployed in the on- and offline promotion of transnational tourism themes;

2.2 An outline of key techniques, instruments and messages in fostering an emotional and memorable connection between consumers and the tourism product (e.g. experiential marketing);

2.3 A step-by-step toolkit giving practical guidance on the development of marketing and promotional activities endorsing transnational thematic experiences and physical routes.

The consultant will recognise that most NTAs/NTOs/DMOs do not themselves invest in product development but take an active role in identifying new approaches to drive innovation in the development and marketing of transnational themes and themed routes. ETC and UNWTO are open to evaluate proposals suggesting a different approach that would fulfil the above mentioned objectives in compliance with the budget and requirements specified in this Invitation to Tender.

All ETC and UNWTO publications, which may be useful to produce this handbook (e.g. consumer studies on key markets, handbooks on product development/e-marketing and key performance indicators), will be made available to the selected consultant. This handbook should in any case provide new and unpublished content and advance ETC’s and UNWTO’s knowledge.

4. **Proposals and Tender Evaluation**

4.1 Proposals

The proposal should include:

- Detailed description of the approach and preliminary selection of criteria to compile the portfolio and toolkit.
- Detailed description of the method to collect best practice examples including comparable criteria.
- Detailed breakdown of prices (travel costs excluded).
- If any, travel costs not covered by ETC (see below) should be separately specified.
- References to similar projects (if applicable).
- Detailed timescale for completion of each part of the handbook.
- Statement of financial viability.
- The CV of the resources involved in the project.

Proposals should be submitted in electronic format, not exceeding 20 pages, to the project leader(s) listed below by **14:00 (CET)** on **September 7, 2015 at the latest**:

**Project leader:**

**Ms. Jennifer Iduh**, ETC Executive Unit: jennifer.iduh@visiteurope.com

**Representatives of the commissioning bodies:**

**Mr. Eduardo Santander**, ETC Executive Unit, Brussels: eduardo.santander@visiteurope.com

**Mr. John Kester**, UNWTO, Madrid: jkester@unwto.org

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*For a full list of ETC studies please refer to [http://etc-corporate.org/?page=research-intelligence](http://etc-corporate.org/?page=research-intelligence).*
4.2 Tender Evaluation

The contract will be awarded on the basis of the consultant’s proven ability to deliver on the stated objectives. The selection criteria used will include, inter alia:

- The relevant experience of the project team, with an emphasis on know-how in research and experiential marketing.
- The approach to compile the portfolio and toolkit.
- The method to select best practice case studies.
- The level of innovation and imagination brought to the project, the methodology and its solution.
- The commitment to deliver results within the allotted timeframe and budget.
- The most economically advantageous project, i.e., the project which offers the best value for money.

ETC and UNWTO reserve the right to decline from all tenders.

5. Timescale, Budget & Deliverables

5.1 Timescale

It is envisaged that the project should be completed and ready for approval within seven months from the date of commissioning. The tenderer should accommodate in his/her time plan ETC’s and UNWTO’s revision of deliverables in each phase of the project.

After the evaluation and the selection of the proposals received, ETC and UNWTO will communicate their decision to all organisations and individuals who submitted a proposal. A kick-off meeting will be held in a major European city with the awarded consultant(s). Travel and hospitality expenses for the official participation in the meeting are to be borne by the awarded consultant(s). The awarded consultants should include an estimate of travel costs in the proposal. A videoconference could be envisaged for non-European based agency/ies.

5.2 Budget & Terms of Payment

ETC and UNWTO have allocated a maximum fixed budget of Euro 58,000 (inclusive of VAT if applicable), and the proposal should be made within this budgetary constraint.

All prices should be quoted in Euro. The contract will be issued in accordance with the rules and procedure of ETC. This exercise commissioned by ETC qualifies as “marketing services” and is therefore subject to Belgian VAT. Please note that ETC should only effectively charge VAT to Belgian companies providing such services. If companies rendering the service qualify as normal VAT taxable businesses, ETC will not have to pay VAT if the companies are not registered in Belgium.

The payments for the work will be made as follows:

- 30% - on commissioning and approval of a detailed delivery schedule of the project.
- 40% - following submission of the handbook and its approval by ETC and UNWTO (N.B. This payment will only be made after all editing requests have been integrated into a final draft which has been approved by both commissioning organisations).
- 30% - the final payment will be made only after completion and approval of the deliverables and as specified in 5.4.

5.3 Sponsorship / Partnership

The consultant is free to explore the possibility of sourcing a sponsor or partner for this handbook. A sponsor organisation would be willing to contribute to the cost of the research in return for co-branding the final report as an ETC / UNWTO / sponsor report. A partner would be willing to participate in the research based on a contribution that would enhance the overall value of the project, without in any way compromising the core objectives of the handbook as set out in the Invitation to Tender. Possible sponsors or partners could be airlines, international hotel groups, credit card companies or other organisations with an interest in the select outbound travel market.

Once a sponsor / partner has been identified, the cooperation will be discussed and a final decision taken by the commissioning bodies.

5.4 Deliverables & Presentation of the Results

The organisation or individual(s) commissioned will be expected to include the following information (and any relevant cost) in the offer:

- A **full report** in electronic format (Word), with the outcome of the analysis; the report should include:
  - An Executive Summary;
  - A clear presentation of main results of phase 1 and 2;
  - A detailed description of the applied methodology (as Annex);
  - Additional material for the inventory of transnational routes and themes (as Annex);
  - Links to download relevant material (as Annex).

- A **PowerPoint presentation** of main results.
- An Infographic of key results for wider dissemination.

The final report should be in **British English** (as opposed to American English). The organisation or individual(s) commissioned 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:

- The organisation or individual(s) should be prepared to organise a **web-based seminar** to disseminate the main results of the handbook.

- 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) are covered by ETC and UNWTO.
6. **Miscellaneous**

Please note that ETC and UNWTO will be the exclusive owners of the data and report, and are free to decide on their use.

The consultant will be responsible for conducting the research in the appropriate language for the sample (and any translating / interpreting that is required).

Brussels, 3 August 2015

**ETC Executive Unit, Brussels**

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*Executive Director*

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