



DOCUMENT III: Terms of Reference

1. About the World Tourism Organization (UNWTO)

The World Tourism Organization (UNWTO) is the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism.

As the leading international organization in the field of tourism, UNWTO promotes tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide.

UNWTO encourages the implementation of the Global Code of Ethics for Tourism, to maximize tourism's socio-economic contribution while minimizing its possible negative impacts, and is committed to promoting tourism as an instrument in achieving the Sustainable Development Goals (SDGs), geared towards reducing poverty and fostering sustainable development worldwide.

UNWTO generates market knowledge, promotes competitive and sustainable tourism policies and instruments, fosters tourism education and training, and works to make tourism an effective tool for development through technical assistance projects in over 100 countries around the world.

UNWTO's membership includes 164 countries and territories and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

2. About the Project

UNWTO is tendering for the development of the 'UNWTO Tourism 2030' Report. The project aims to:

- 1) update UNWTO 2030 quantitative forecast (see <https://www.e-unwto.org/doi/book/10.18111/9789284414024>); and
- 2) identify megatrends and their impact on tourism development towards 2030 (qualitative)

UNWTO Tourism 2030 Report is a continuation of UNWTO's work in the area of long-term forecasting initiated in the 1990s which aims to:

- Identify long-term trends and scenarios for the development of international tourism;
- Determine megatrends and their impact on tourism development;
- Contribute to identify adequate tourism policies and strategies at national and local level.
- Support UNWTO strategic planning

3. Objectives

The report is expected to:

- Update UNWTO's long-term forecast of international tourism through the year 2030;
- Identify megatrends and their impact on tourism development (STEEPLED analysis);
- Constitute a world reference on long-term tourism forecast and trends;
- Support countries, private sector, international organizations and all stakeholders in the sector in future proofing and; and
- Contribute to UNWTO's strategic planning towards 2030

4. Structure and Methodology

4.1 Structure

It is up to the contractor to propose a detailed and innovative structure and methodology for the report.

The content of the report should include, but not be restricted to:

- a) Quantitative scenarios on the number of international tourist arrivals until 2030 (2017 as the base year):
 - worldwide
 - by region and subregion of destination (inbound)
 - by region and subregion of origin (outbound)

- b) Global, regional and subregional forecasts for the following indicators:
 - International tourist arrivals by:
 - purpose of visit: 1. leisure and recreation; 2. professional and business; and 3. Visiting Friends and Relatives (VFR) and other
 - means of transport: 1. air and 2. surface
 - 100 population according to region and subregion of destination (inbound)
 - 100 population according to region and subregion of origin (outbound)

 - Accommodation:
 - capacity (number of rooms and bed-places)
 - overnight stays by non-residents in accommodation units
 - overnight stays by residents in accommodation units

- c) STEEPLED analysis, identification of megatrends and their impact on tourism

- d) Qualitative trends in tourism development through the year 2030, in terms of:

Note: The historical data series for the quantitative forecast will be provided by UNWTO. This includes detailed data series (1980-2017) on international tourist arrivals by region, subregion and country of destination, including distribution by region of origin, means of transport and purpose of visit. Furthermore, UNWTO will provide additional data series (1980-2017) on accommodation capacity, overnights stays and occupancy by country (the coverage is more limited and implies developing estimates for missing data to produce subregion, region and world totals).

- Five UNWTO regions (Africa, Americas, Asia and the Pacific, Europe and Middle East)
- Major Source Markets
- Consumer Trends and Travel Trends
- Tourism Products/Experiences and Segments
- Innovation and Digital Transformation
- Marketing and Promotion
- Distribution and Commercialization
- Jobs and Education (Future of Work)
- Travel Facilitation and Seamless Travel (visas, biometrics, etc)
- Safety, Security and Emergency Response (including risk and crisis management)
- Investment and Entrepreneurship
- Destination Management and Tourism Governance

The report should consider the following key framework issues:

- The Sustainable Development Goals (SDGs) and the 2030 Agenda
 - Social and Cultural Sustainability
 - Environmental Sustainability and Climate Change
 - Competitiveness of tourism destinations
- e) 'Visions': a series of invited experts/practitioners views that provide a concise and relevant contribution in each of the subjects.
- f) Recommendations and key messages on how to manage challenges and maximize opportunities arising from the report.

4.2 Methodology

Quantitative forecast:

- revise and update UNWTO Tourism Towards 2030 (<https://www.e-unwto.org/doi/book/10.18111/9789284414024>)
- explore the relationship between economic growth and international tourist arrivals;
- analyse past evolution to identify typical growth curves;
- extrapolate actual time series with use of econometric model(s);
- include a margin of uncertainty, with forecast within an interval with lower and upper variant;
- include variants based on differing conditions (scenarios).

Qualitative Trends:

- desk research
- survey to UNWTO Member States and Affiliate Members and other relevant stakeholders
- in-depth interviews with relevant stakeholders and experts
- workshop sessions
- partnerships with relevant parties on content considered relevant

The report should use UNWTO terminology, definitions and data, as well as UNWTO's authors guidelines.

The contractor should present proposals taking into account the above framework for content, and using their creativity and knowledge to set up the proposed structure and content to attain the objectives of the project.

UNWTO encourages the contractor to develop and propose their own project approach. The contractor should be able to identify experts where necessary as well as work with experts identified by UNWTO.

5. Budget, Deliverables and Timeframe

5.1 Budget

UNWTO has allocated euro 60.000 to this project.

The budget should include the participation of the contractor's team in two coordination meetings at UNWTO Headquarters in Madrid for one full day each and coordination of a 2 hours' workshop in a location in Europe (UNWTO to cover transport and accommodation for the workshop).

6. Deliverables

- Complete set of Excel files used for the preparation of the report
- Detailed methodological note on the forecast model
- Full report (not exceeding 80 pages, plus annexes with tables, bibliography, methodology, etc)
- Executive summary (not exceeding 10 pages)
- One page factsheet with key findings
- Set of five infographics with key findings
- A power point presentation on the key conclusions of the report (not exceeding 15 slides)
- A webinar

The quality and innovation of the report structure and deliverables will be an added value.

7. Timeframe

The contractor should propose a detailed work plan based on the timeframe defined by UNWTO (see annex 1).

8. Proposal

8.1 Proposal content

The contractor should present a proposal for evaluation that includes a clear description of:

- Proposed project approach and vision
- Proposed outline and detailed content
- Quantitative Methodology
- Qualitative Methodology
- Experience of the contractor in similar projects

- Team, roles and relevant experience of individual team members
- Proposed work plan and project management
- Reporting elements
- Deliverables
- Other relevant information.

8.2 Evaluation Criteria

The proposal will be evaluated according to a pondered scoring of the following criteria:

Proposed project approach

- vision and approach
- structure and content of the report
- methodology
- project management
- presentation and visualization of results
- timeframe

Proposed forecasting methodology

- clarity and soundness of proposed methodology
- analysis tools

Relevant experience of the contractor in projects of similar nature

- forecasting methods
- megatrends
- tourism trends

Relevant experience of team members

Innovation and creativity of the proposal

Added-value initiatives

- partnerships
- any other initiatives that add value to the project without compromising the core project