



COLLEGIATE ECHO MARKETING CHALLENGE  
[www.CollegiateECHO.org](http://www.CollegiateECHO.org) | [#collegiateECHO](https://twitter.com/mktgEDGEorg) | [@mktgEDGEorg](https://twitter.com/mktgEDGEorg)

CLIENT BRIEF | OFFICIAL RULES  
2016-2017

*Challenge by:* Collette Travel  
*Sponsored by:* Marketing EDGE

# COLLEGIATE ECHO MARKETING CHALLENGE

## CLIENT BRIEF

### About Collette

Collette is a third generation, family-owned company with offices in the United States, Canada, Australia and the United Kingdom. Our mission is to enhance life's journey by creating extraordinary travel experiences. Collette operates over 140 guided tours across all 7 continents. We are approaching our 100<sup>th</sup> year anniversary which will be in 2018. Collette focuses on the overall tour experience and service as we are a 4-star tour operator. Our top priorities are guest safety and satisfaction. We take pride in hiring and retaining the top tour managers in the industry. Our guided tours include all the details of your trip including airfare, hotels, meals, sightseeing, attractions and cultural experiences. Distribution channels include travel agents as well as direct-to-consumer.

### Product Development

The Product Development team that creates the guided tours work on a two- to three-year timeline from the planning stages to the release of a guided tour. Guests make their travel plans at a minimum of 6-9 months from travel date. With this extended timeline, Collette needs to understand the travel needs, wants, and trends of consumers before they make their travel decisions.

Our current product lines are:

- **Classic** – Flagship collection of tours allowing you to marvel at the must-sees, become a part of a new culture, with time to explore on your own (max 44 guests).
- **Explorations** – Small group tours (avg 18 guests) with culturally immersive adventures that take you off the beaten path. Stay in boutique accommodations and enjoy authentic culinary experiences.
- **Spotlights** – Single hotel stays and quick getaways with more freedom to explore on your own, but also enjoying the benefits of inclusive guided travel.
- **River Cruise** – As experts in guided travel we partnered with the experts in river cruising to provide the ultimate river/land touring experience. This is not our core competency but we have a small offering as our consumers like to cruise as well. We are **not** looking to evolve with river cruise driving the majority of our business.

### Demographics and Marketing

Our current core travelers are Traditionalists and older Baby Boomers. The profiles within these generations who travel on guided tours have above average education and net worth. Baby Boomers will increasingly drive the market as Traditionalists will “age out” and Generation X will start to become a significant group to market to. We currently drive awareness and bookings through a national sales team working with travel agents and group leaders, direct mail, online marketing, social media, partnerships, and television.

### The Challenge

Research and evaluate the travel needs of consumers and their expectations for travel experiences today, and for the future. Create an example of an ideal travel experience and develop an integrated marketing plan to entice consumers to travel with Collette. Your budget is up to \$5MM to drive leads and convert to booking tours for 2020 and beyond targeting the following audiences.

- 1<sup>st</sup> Semester Challenge (fall 2016) - Baby Boomers
- 2<sup>nd</sup> Semester Challenge (spring 2017) - Generation X

### Considerations

Based on market research, what is the ideal travel experience for the target market?

- Are there opportunities to expand/evolve existing product lines or create something new and different? (We are not looking for a Disney vacation, Caribbean Cruise or all-inclusive Sandals Resort type of travel)
- The experience should include ideal length, key elements such as cultural experiences, amount of free time vs. planned activities, etc.
- How will Collette's travel experience be presented to potential consumers to drive awareness and engagement through positioning, visuals and messaging?

- What is the travel experience and how do we market to the core audience? Scoring will emphasize:
  - 50% market research and related development of travel experience
  - 50% marketing plan

### Success Criteria

- 1) How thorough is the market research?
- 2) Is the marketing strategy clear and concise?
- 3) How effectively does the marketing campaign drive leads?
- 4) Does the proposal suggest ways to expand/evolve existing product lines and/or create something new and different?
- 5) Do the proposed product line amendments flow from the market research?
- 6) How realistic is the budget?
- 7) Is the projected return on investment realistic?
- 8) How well integrated is the media plan? Does it employ media where the targeted demographic will likely be found? Does it take into consideration the way the audience plans its travel (mentioned above)?

### Deliverables

- 1) **Executive Summary and Proposal** in writing with visual support (elements 1-3 below are separate document each with its own page count):
  1. 1-Page **Executive Summary**
  2. **Written Proposal** of no more than 10 pages, excluding appendices
  3. **Strategic Summary Chart**, up to three (3) pages, a two-column document listing key marketing research conclusions in the 1st column and corresponding proposed strategies in the 2nd column.
- 2) **Appendices** (max. 20 pages) are backup for the proposal, including research documentation, a detailed annual budget allocated by media and tactics with forecasted results, as well as references and citations.
- 3) **Visual Summary** in PowerPoint or a 3 minute video
- 4) **Team photo** with team name and members' names (identified left-to-right in a separate document). Winning team photos will be featured on Marketing EDGE's Website/Social Media Channels/Communications

Questions? Visit [www.CollegiateECHO.org](http://www.CollegiateECHO.org) for details on where to submit your queries. Visit [gocollette.com](http://gocollette.com) for our full product offering.

### To Ask Further Questions

To make this process more efficient, we ask that students 1) first review the Rules Booklet and the FAQs and then 2) ask their faculty advisor before submitting their questions, and finally (if they don't have the answer) 3) compile their questions and forward them to [admin@marketingEDGE.org](mailto:admin@marketingEDGE.org) with the Subject Line: Collegiate ECHO Questions and the Team Name and Team Member's name in the body of the email. We will only answer questions from registered participants.

**NOTE:** Neither Collette Travel nor Marketing EDGE will take questions directly at their offices.

### WHO MAY ENTER?

1. The 2016-2017 Marketing Challenge is open to all undergraduate and graduate students, worldwide, in all majors. Only entries in English will be considered.
2. Only teams comprised of two (2) - five (5) students may participate.
3. Undergraduate and graduate students may not combine to form teams. Graduate and undergraduate entries will be judged separately.
4. The Challenge must be started and completed within either fall semester 2016 or the spring semester 2017.
5. Only teams that register by submitting an Intent to Compete Agreement may participate.
6. Teams may work independently or with a faculty advisor. Faculty advisors may guide in the manner of teaching, but must not assist with work on the campaign, develop the marketing

strategy, media or creative plans, or make final decisions regarding the campaign. No two teams should have the same marketing strategy, media or creative plan.

7. Teams may enter in the fall or spring by the appropriate deadline shown on p. 5. Judging for both fall and spring is completed in the summer of 2017.

## REGISTRATION AND ENTRY

### Registration: Intent to Compete Agreement Forms Are Required

**Faculty Advisors** and **all Student Team Members** are required to register for the Challenge by completing an online **Intent to Compete Agreement** form via the link at [www.CollegiateECHO.org](http://www.CollegiateECHO.org) by the appropriate deadline (see p. 5). You will be asked to open an account on our reviewing partner's website, Submittable.com to begin the agreement.

**Faculty:** It is recommended that faculty advisors complete this form before the semester begins. The form requests contact information and:

- The number of teams expected to participate,
- Check boxes for the capacity in which they will participate (course work, independent study or capstone course, marketing club, etc.).

Upon submission of the **Intent to Compete Agreement** form, **faculty advisors** receive links to teaching resources and past winning entries for the Challenge.

**Students:** For their entries to be considered, all team members are required to complete an **Intent to Compete Agreement** once the team is formed, via the link to Submittable at [www.CollegiateECHO.org](http://www.CollegiateECHO.org) by the appropriate deadline (see p. 5). This form requires the team members' names, emails, graduation month(s)/year(s), and permanent mailing addresses (to award prizes). Upon completion of this agreement, each team member receives a link to a choice of a complimentary 90-120 minute online learning module.

## AGREEMENT

### HOW TO ENTER

1. Download and review the 2016-2017 Collegiate ECHO Marketing Challenge Official Rules Booklet, and read the Collegiate ECHO website materials. The Official Rules are located at [www.CollegiateECHO.org](http://www.CollegiateECHO.org).
2. Give your team a unique name, and then complete an online Intent to Compete Agreement Form, required for all faculty advisors and students participating, by the deadline for the semester you're entering. Upon completion of the form, students and faculty will have access to materials that will assist in the successful completion of the Challenge.
3. Only one team member may post their team's entry deliverables (p. 2-3) to their account at Submittable.com. If videos are included, they must be uploaded to YouTube. Video links are to be included in the Executive Summary Proposal, and Visual Summary; backup video files may be posted if necessary.
4. The school must not be identified in any way throughout the entry, except (optionally) in the team photo, which will be uploaded in a separate area. Identify the members shown, preferably in a separate document (e.g., Team Name left-right, Name1, Name2, etc.).
5. The team name (and the team member's names), must appear on the title page of all documents or in the video (if chosen for the Visual Summary) without school identifiers - see item 4.
6. Marketing EDGE and Submittable are not responsible if the judges cannot open your files, so we suggest you test them to ensure they open properly.
7. Participants are encouraged to provide their resumes, as employment opportunities may be available after the Challenge concludes.
8. Projects that do not adhere to all of the Challenge rules and deliverables will not be passed on for judging.
9. **AGREEMENT:** By their participation, all team members and faculty advisors agree to adhere to the rules in this booklet, at [www.CollegiateECHO.org](http://www.CollegiateECHO.org), and the online Intent to Compete Agreement.

## JUDGING

The goal of the Collegiate ECHO Challenge is to generate excellent marketing thinking and quality creative work, focusing on strategy stemming from research.

### Judging Criteria

1. The team demonstrates an understanding of the client's marketing objectives.
2. The team has conducted primary and secondary market research, and provided a marketing strategy, media plan and creative strategy that are cohesively based on their research findings, and meet the campaign objectives.
3. Thoroughness of argument: The argument is supported with evidence/research.
4. The choice of metrics is appropriate for measuring the success of the campaign.
5. All deliverables are provided. The project is complete.
6. The quality and professionalism of the presentation are clearly evident.

### Overview of Judging Procedures and Awards

1. Final judging for both semesters will take place from May-June of 2017. All decisions made by the judges are final. Prizes will be awarded at the discretion of Marketing EDGE and Collette Travel
2. Each entry will be evaluated by different judges, who are professional marketers and client representatives. Entries will be judged on the above Judging Criteria and Success Criteria (p. 3) and the scoring rubric made available to faculty.
3. Entries scoring in the top 10% are designated as semi-finalists. Ultimately, Collette Travel selects the Gold, Silver and Bronze winners as well as honorable mentions from among the semi-finalists.
4. In addition to Gold, Silver, and Bronze Awards, the judges and Marketing EDGE and Collette Travel may give Honorable Mentions to those teams that demonstrate excellence in the following individual categories:
  - Market Research
  - Marketing Strategy
  - Media Plan
  - Budgeting / ROI
  - Creative Strategy
  - Executive Summary
  - Visual Summary
  - Innovation
5. Prizes will be awarded in separate divisions: to the winning undergraduate teams and the winning graduate teams.
6. Qualifying team members are eligible to apply for Marketing EDGE Collegiate ECHO Scholarship. Visit [www.CollegiateECHO.org](http://www.CollegiateECHO.org) to see the prize structure.

## DEADLINES | KEY DATES

### FALL ENTRIES

October 17, 2016

**Intent to Compete Agreement** for fall entries must be completed by each team member in order for a team to be eligible to participate.

December 12, 2016

Entry presentation due for teams organized during the fall semester/quarter.

### SPRING ENTRIES

March 17, 2017

**Intent to Compete Agreement** for spring entries must be completed by each team member in order for a team to be eligible to participate.

May 15, 2017

Entry presentation due for teams organized during the winter or spring semesters/quarters.

### BOTH SEMESTERS

May-mid-July 2017

Judging of presentations.

Mid-July 2017

Notification of results to faculty via email.

August 31, 2017

Acceptance and selection of prizes by winning team student members. Prizes not claimed by this date will be forfeited. We therefore suggest that you provide an email where you can be reached during the summer at the time you register.