

TERMS OF REFERENCE (TOR)

PROCUREMENT OF THE SERVICES OF A RESEARCH/SURVEY COMPANY TO CONDUCT THE 2018 TPB CUSTOMER SATISFACTION SURVEY

BACKGROUND AND OBJECTIVES:

The Tourism Promotions Board (TPB), an attached agency of the Department of Tourism, is the main authority assigned to market and promote the Philippines as a world-class tourist destination. TPB envisions the Philippines to become one of the most preferred destinations in Asia-Pacific by 2022. With this goal, TPB has conducted yearly promotional programs which include organized business/sales missions, roadshows, tourism marketing educational seminars, product updates and major tourism events such as the Philippine Travel Exchange (PHITEX) and Dive Fiesta Philippines. TPB has also participated in overseas and local travel trade fairs and implemented invitational programs/familiarization tours for travel agents, tv/magazine personalities, travel bloggers, social media influencers and key opinion leaders to boost its promotional efforts for the Philippines. The exhibitors, program attendees and media personalities taking part in these projects/events were hereby treated as the 'customers' of TPB.

In TPB's commitment of improving its services to its customers and complying with its performance agreement with the Governance Commission for Government-Owned and Controlled Corporations (GCG), the agency has commissioned the services of a research/survey company every year since 2015 to conduct a transparent and objective Customer Satisfaction Survey. The main objective of the survey is to assess its customers' overall satisfaction and perception on the services rendered to them by TPB during the implementation of its international and domestic projects/events. However, for the 2018 implementation, GCG has released a standard guideline that shall govern all GOCCs in the conduct of their annual Customer Satisfaction Survey. This guideline shall be followed by the winning research/survey company in implementing the 2018 Customer Satisfaction Survey of TPB.

SURVEY METHODOLOGY:

The guideline released by GCG contains the standard methodologies to be used by GOCCs in reaching its customers during the survey fieldwork. Through further coordination with GCG, **Method C: Intercept Interviews + Telephone Interviews** was prescribed as the most suitable methodology to employ during the conduct of the Customer Satisfaction Survey.

However, given the nature of TPB's events and interaction with clients, GCG has also suggested other methodologies to use particularly for reaching clients that participated in overseas events or are based abroad:

- For exhibitor/attendees in TPB’s overseas events- aside from intercept interviews, a scheduled face-to-face interview may also be employed upon their return to the Philippines. The interview should be conducted at most within a week or two from the customers' return to the country to ensure that they can sufficiently recall, assess, and evaluate their experience in participating in TPB's overseas event.
- For social media influencers- apart from telephone interviews, the research/survey company may also schedule face-to-face interviews or email the survey for self-administration of the respondent. The filled-out survey forms should be returned or emailed back to the interviewer/researcher in a scanned PDF or JPEG format. Majority of these customers are living abroad.

Please take note that the research/survey agency may still recommend other appropriate methodologies to utilize for the effective and efficient implementation of the survey, subject to the approval of TPB.

SAMPLE SIZE:

Based on the 2017 customer database, the population of TPB customers is about 1,222 unique companies/individuals. For this survey, TPB shall be targeting a sample size of **n=300**, with the breakdown per customer type as follows:

CUSTOMER TYPE	SAMPLE SIZE
Exhibitors	46
Attendees	208
Social Media Influencers	46
TOTAL	300

(Please see attached ANNEX A- for the proposed number of respondents per event. Events to be covered will be finalized during the preparation of inception report for TPB’s approval.)

Definition of Terms:

- Exhibitors- private sector companies that participated in at least one (1) travel trade fair or domestic promotion event (e.g. Travel Tour Expo, Philippine Travel Mart). All of these customers are based in the Philippines.
- Attendees- private sector companies that joined at least one (1) business/sales mission, roadshow, product update, tourism marketing educational seminar, major tourism event (e.g. Philippine Travel Exchange, Dive Fiesta Philippines) and invitational program/familiarization tour for travel agents. These customers are a mixed of Filipinos and foreigners living within or outside the Philippines.
- Social Media Influencers- individuals (e.g. tv/magazine writers, celebrities, production crew, travel bloggers, key opinion leaders) that joined at least one (1) invitational program/familiarization tour for media. Nearly all of these customers are foreigners and based abroad.

Given that some customers can be an exhibitor of an event and an attendee of another event, it is possible that some customers may be interviewed twice. However, the research/survey agency may also screen out customers who were interviewed in previous events held within the year. Data collection period shall commence from the issuance of the Notice to Proceed (NTP) until December 2018.

SCOPE OF WORK

The selected research/survey company must comply with the guidelines published by GCG in conducting the survey:

- Use of the structured pen and paper questionnaire composed of a screener test and the main questionnaire. Additional questions or performance metrics can be added upon the approval of TPB. However, questions indicated by GCG in the questionnaire are fixed and cannot be altered without prior approval from it.
- Follow the 5-point Likert scale for all rating questions

Very Satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1

- Signing of a Non-Disclosure and Confidentiality Agreement by the researchers and all of their partners to ensure confidentiality of any data (e.g. contact details of customers) to be provided to them by TPB.
- Adherence to the rules and procedures for data collection, quality control, data encoding and processing as stated in GCG’s guidelines.
- Actual accomplished survey forms should be organized and readily-available upon the request of GCG.
- Analysis of survey results with the minimum required information as follows:
 - Averaging of the overall satisfaction rating
 - Distribution of the responses for each point of the Likert scale
 - Crosstabs of the reasons for overall satisfaction rating against type of raters to determine the primary reasons for satisfaction and dissatisfaction
 - Determining the correlation of the satisfaction levels of each attribute with the overall satisfaction rating (through regression analysis)
 - Plotting derived importance score per attribute against satisfaction score per attribute in a four-box scatter diagram.
 - Important and high rated
 - Important but low rated
 - Not important but high rated
 - Not important and low rated

- Moreover, the analysis plan should also include a reading of the following segments:
 - By total respondents
 - By areas of coverage
 - By customer type
 - By rating (positive/negative raters)

DELIVERABLES

- Submission of the inception report within one (1) week after the inception meeting and discussion of sampling design, methodology, protocols and work plans.
- Review of the questionnaire provided by GCG (*please see attached ANNEX-B*), inclusion of questions specific to the services of TPB (with the approval of TPB) and provision of corresponding translations of the survey instrument particularly in Mandarin, Korean, Japanese, and Filipino.
- Pilot-testing of the questionnaire prior to actual fieldwork to ensure clarity and comprehension, to check for biases, and to assess interview length. The questionnaire should be pilot-tested to at least three (3) respondents who would no longer be included in the sample during the actual interviews.
- Quarterly status reports including partial tabulation and analysis which shall be submitted by TPB to GCG
- Draft full report on survey findings (taking into account the minimum information required by GCG), recommendations and suggestions on how to improve customer service in a manner which addresses customer concerns within the framework of TPB's mandate **on or before 13 February 2019**.
- Final full report on findings and recommendations, taking into account TPB's comments on draft report, in both hard and soft copy within ten (10) to fifteen (15) calendar days after receiving comments on the draft report.
 - Highlights of the result of the survey in PowerPoint format (soft copy only);
 - Detailed report in three (3) hard copies as well as digital format; and
 - Detailed data tabulation in three (3) hard copies as well as digital format (excel file)
- Presentation of the comprehensive report to the TPB Management Committee (MANCOM) by the research/survey team upon request of TPB.

APPROVED BUDGET FOR THE CONTRACT (ABC):

The 2018 Customer Satisfaction Survey shall be undertaken for the amount of **PhP 1,500,000.00** inclusive of value-added tax (VAT) and all other applicable taxes.

The indicative payment scheme is as follows:

Output/Milestone	% of payment
Upon submission and approval of the inception report (with indicated sampling design, methodology, protocols, work plans and specific timelines)	10%
Upon submission and acceptance of the pilot-testing results and finalized survey questionnaire	20%
Upon submission of the 3 rd Quarter Status Report with tabulation and analysis	10%
Upon submission of the 4 th Quarter Status Report with tabulation and analysis	10%
Upon submission and acceptance of the first draft of full report on findings and recommendations	25%
Upon submission and acceptance of the final comprehensive report (in hard copies and digital format)	15%
Upon presentation of the final comprehensive report to the TPB Management Committee (MANCOM)	10%
TOTAL	100%

QUALIFICATIONS OF THE RESEARCH/SURVEY COMPANY

- The research/survey company should possess at least five (5) years of experience in conducting customer satisfaction surveys and related researches, including analysis and presentation.
- All key personnel to be assigned in the project should have at least three (3) years of relevant work experience in conducting surveys.
- Has provided services to multinational clients in the past three (3) years.
- Has own proprietary research tool/s or methodology which is internationally accepted and provides clients with comprehensive insights on customer satisfaction and perception.
- Member of good standing in any internationally-recognized association of marketing research agencies.
- Conformity with the required research/survey team composition and structure as stated in GCG's guidelines.
 - Project Manager
 - Research Executive
 - Data Processing Supervisor
 - Field Supervisor
 - Statistician / Quality Checker
 - Data Processor/ Tabulator
 - Data Encoders

- Field Quality Checkers
- Field Interviewers

SHORTLISTING CRITERIA AND RATING SYSTEM

Based on section 24.5.3 of R.A. 9184, the criteria and rating system for short listing of research/survey agencies is as follows:

CRITERIA	% WEIGHT
Applicable experience of the consultant and members on case of joint ventures, considering both the overall experiences of the firm or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants;	40
Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking; and	35
Current workload relative to capacity	25
TOTAL	100

PROPOSALS

The research/survey company is expected to submit technical and financial proposals which shall be evaluated based on Quality Cost Based Evaluation (QCBE). The winning bidder must attain a hurdle rate of 85% based on the following set of selection criteria with their corresponding weight assignments:

Proposal	Weight (%)
Technical	85
Financial	15
TOTAL	100

Bidders are required to present (maximum of 20 minutes) their plan approach for the project.

Based on section 33.2.2. of R.A. 9184, the technical proposal and presentation of the research/survey agency shall be evaluated based on the following criteria with corresponding numerical weights:

CRITERIA	% WEIGHT
<p>1. Quality of Personnel to be assigned to the Project (15 points)</p> <p>1.1 Profile and expertise of key personnel who will be assigned to the project, showing areas of specialization (15 points)</p>	15
<p>2. Research/Survey Company’s Experience and Capability (40 points)</p> <p>2.1 Bidder’s expertise in conducting surveys using different methodologies for reaching specific customer types and capacity to implement the survey in an international coverage (20 points)</p> <p>2.2 Quality and quantity of similar surveys handled (10 points)</p> <p>2.3 Quality / profile of previous clients in similar projects (10 points)</p>	40
<p>3. Plan of Approach and Methodology (45 points)</p> <p>3.1 Proposed workplans in conducting the survey based on the methodologies prescribed by GCG (15 points)</p> <p>3.2 Project plan approach to be utilized to achieve the deliverables/ expected outputs within the specified timeframes (20 points)</p> <p>3.3 Manner of presenting the survey results and recommendation (10 points)</p>	45
TOTAL	100