

TERMS OF REFERENCE (TOR)

PROCUREMENT OF THE SERVICES OF A RESEARCH/SURVEY COMPANY TO CONDUCT THE 2020 TPB CUSTOMER SATISFACTION SURVEY

BACKGROUND AND OBJECTIVES:

The Tourism Promotions Board (TPB), an attached agency of the Department of Tourism, is mandated to market and promote the Philippines as a major global tourism destination. TPB envisions the Philippines to become the preferred destination for safe, uniquely diverse, and fun travel by 2025. With this goal, TPB has been organizing promotional programs which include business/sales missions, roadshows, tourism marketing educational seminars, product inventories and major tourism events such as the Philippine Travel Exchange (PHITEX) and Philippine MICE Conference (MICECON). TPB is also participating in overseas and local travel trade fairs and implementing invitational programs/familiarization tours for travel agents, TV/magazine personalities, travel bloggers, social media influencers and key opinion leaders to boost its promotional efforts of the Philippines. The exhibitors, program attendees, familiarization trip participants and social media influencers taking part in these projects/events are hereby treated as the customers of TPB.

In TPB's commitment of improving its services to customers and comply with its performance agreement with the Governance Commission for Government-Owned and Controlled Corporations (GCG), the agency has been commissioning the services of a research/survey company every year since 2015 to conduct a transparent and objective Customer Satisfaction Survey. The survey is designed to assess the TPB customers' overall satisfaction and perception on the services rendered to them by the agency during the implementation of its international and domestic projects/events.

The research/survey company is required to conform to the following guidelines prepared by GCG for the implementation of the 2020 TPB Customer Satisfaction Survey:

- a. Enhanced Standard Guideline on the Conduct of Customer Satisfaction Survey (released on 26 September 2019).
- b. Additional Guidelines in the Conduct of the Customer Satisfaction Survey (CSS) for 2020 in the GOCC Sector (released on 19 August 2020).

DEFINITION OF TPB CUSTOMERS:

Exhibitors- private sector representatives who joined the travel trade fairs or domestic promotion events (e.g. International Boat Show- Dusseldorf, Tourism Expo Japan, Regional Travel Fair) that were either organized or supported by TPB. All of these customers are based in the Philippines.

Attendees- private sector representatives who joined the TPB educational seminars business/sales missions, roadshows, and major tourism events (e.g. Philippine Travel Exchange, Philippine MICE Conference). These customers are a mix of Filipinos and foreigners living within or outside the Philippines

Familiarization Trip Participants and Social Media Influencers- travel agents and media personalities (e.g. TV/magazine writers, celebrities, production crew, travel bloggers, key opinion leaders, and alike) who joined the invitational programs/familiarization trips and tourism destination inventories implemented by TPB. Majority of these customers are foreigners and based abroad.

SURVEY METHODOLOGY:

a. Below are the recommended survey methodologies per customer type:

CUSTOMER TYPE	METHODOLOGY
Exhibitors	Online Survey Tool/Platform
Attendees	Online Survey Tool/Platform
Familiarization Trip Participants and Social Media Influencers	Online Survey Tool/Platform

b. Conduct of Interviews through Online Survey Tool/Platform

- The use of an online survey tool/platform for data gathering should be accompanied by a report detailing the comprehensive quality control measures employed to ensure the validity and reliability of the data collected.

SAMPLE SIZE:

Due to the COVID-19 pandemic, numerous scheduled projects/events of TPB have been cancelled, while others were postponed several times. With the fluid global situation brought by the pandemic, the population of TPB’s customers may change further within the year.

Indicatively, the sample size for 2020 is projected to range from 224 to 300 respondents. The sample size and its distribution per customer type will be finalized during the preparation of the Inception Report. The formula below will be used for the computation:

$$\text{Sample size} = \frac{\frac{z^2 \times p \times (1-p)}{e^2}}{1 + \left(\frac{z^2 \times p \times (1-p)}{e^2 N}\right)}$$

Where $z = 1.96$ at 95% confidence level
 N = target universe or population
 e = margin of error at $\pm 4.3\%$
 p = sample proportion

SCOPE OF WORK:

- a. Finalization of the sample size per customer type.
- b. Use of the GCG-approved questionnaires composed of a screener test and a main questionnaire. Service specific questions can be added to the questionnaires (under the Execution of Service Section) subject to the approval of TPB.
- c. 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

- d. Signing of a Non-Disclosure and Confidentiality Agreement by the researchers and all of their partners to ensure confidentiality of the data (e.g. contact details of customers) to be provided to them by TPB.
- e. Recruitment of respondents: contact details will be provided by TPB after signing of the Data-Sharing Agreement.
- f. Adherence to the rules and procedures for data collection, quality control, and data processing as stated in the GCG guidelines.
- g. Analysis of survey results with the minimum required information as follows:
 - i. Data Gathering Methodology (i.e. sampling procedure, total primary customers, sample size used, survey methodology, frequency of data collection).
 - ii. Percentage of satisfied customers using the Top 2 Box (Very Satisfied and Satisfied)
 - iii. Average of the overall satisfaction rating.
 - iv. Crosstabs of the reasons for overall satisfaction rating against type of raters (positive and negative).
 - v. Derived Importance thru Correlation and Modified Kruskal Analysis.
 - vi. Scatter Diagram of derived importance and average performance score.
 - vii. Apostle Model of Customer Loyalty
 - viii. Trending analysis of the results of the TPB Customer Satisfaction Survey in the past five (5) years (as much as feasible) using similar criteria.

- h. Interpretation and analysis of the results based on the following segments:
- i. By total respondents
 - ii. By areas of coverage
 - iii. By customer type
 - iv. By rating (positive/negative raters)
 - v. By drivers of satisfaction (derived importance)

DELIVERABLES:

- a. Inception Report
- b. Questionnaires with recommended additional question items for the Execution of Service section
 - ✓ With corresponding translations to other languages as needed.
 - Note: Copy of the questionnaires will be provided upon request of the interested bidders.*
- c. Draft Survey Report on findings, analyses and recommendations. The report should also include the results of the following activities:

ACTIVITY	INCLUSION ON THE SURVEY REPORT
Pre-Test	Survey Instrument Stimulus Materials Pre-Test Results Pre-Test Report
Training	Survey Instrument Stimulus Materials Training Manuals Training Report
Project Kick-off/Start-off	Survey Instrument Stimulus Materials Observation Report Clearing/Debriefing Report
Project Implementation	Supervision/Observation Report Fieldwork Progress Report
Back-checking and Spot-checking	Back-checking and Spot-checking Report Report on Automated Checks (for CAPI surveys)
Data Processing	Spot Checking Report for Data Processing Data Quality Control Report

- d. Comprehensive Final Report (3 hard copies and digital format)
 - ✓ All survey findings, analyses and recommendations as included in the Draft Survey Report
 - ✓ All survey activity results as included in the Draft Survey Report

- ✓ Tabulation of aggregate data (excel format)
 - ✓ Sample accomplished survey forms (5 per customer type)
- e. Powerpoint Presentation of the Comprehensive Final Report

APPROVED BUDGET FOR THE CONTRACT (ABC):

The 2020 TPB Customer Satisfaction Survey shall be undertaken for the amount of **Two Million Five Hundred Thousand Pesos (Php 2,500,000.00)** inclusive of value-added tax (VAT) and other applicable taxes and fees.

DURATION OF WORK:

Below is the indicative schedule of activities:

Date	Activities/ Deliverables
04 January 2021	Kick-Off Meeting between the research/survey company and TPB representatives
05 January 2021	Submission of the Inception Report and Questionnaires (with inputs)- 1 st draft
06 January 2021	TPB’s submission of comments on the Inception Report and Questionnaires
07 January 2021	Submission of Inception Report and Questionnaires (with inputs)- 2 nd draft
08 January 2021	TPB’s submission of comments on the Inception Report and Questionnaires
09 January 2021	Submission of the Final Inception Report and Questionnaires
11-13 January 2021	Pilot-testing of the Questionnaires
15 January 2021	Submission of Pilot-testing results and finalized survey questionnaires
17 January 2021	TPB’s approval of the finalized survey questionnaires
18-31 January 2021	Data collection proper
15 February 2021	Submission of the Draft Full Report- 1 st draft
26 February 2021	Submission of the Draft Full Report- 2 nd draft
05 March 2021	Submission of the Comprehensive Final Report (in hardcopies and digital format)
10 March 2021	Presentation of the Comprehensive Final Report (in ppt) to the TPB Management Committee

***Note:** Proposed timeframe may be adjusted subject to the recommendation of the research/survey company and the approval of TPB.*

QUALIFICATIONS OF THE RESEARCH/SURVEY COMPANY:

- a. 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. The research/survey company must submit a list of ongoing and completed government and private contracts for the last five (5) years.

- b. All key personnel (based on item f below) to be assigned in the project should have at least three (3) years of relevant work experience in conducting research/surveys. Curriculum vitae of all key personnel must be submitted.
- c. Has provided services to multinational clients in the past three (3) years (provide copy of Notice to Proceed, Contract, Certificate of Project Completion, or whichever is applicable).
- d. Member of good standing in any internationally-recognized association of marketing research agencies (provide proof of membership and/or certificate of good standing).
- e. Compliant to legal standards on data privacy and protection.
- f. Conformity to the key personnel composition as stated in the GCG guideline:
 - Overall Project Manager
 - Assistant Project Managers (Project Manager & Statistician)
 - Overall Field Manager
 - Overall Data Processing Manager
 - Data Processing Supervisor / Digital Operations Supervisor OR Encoding Supervisor
- g. Bidders shall prepare a 15-minute presentation of the plan approach

TERMS OF PAYMENT:

The indicative payment scheme is as follows:

OUTPUT/MILESTONE	% OF PAYMENT
Upon submission and approval of the Inception Report and approval of survey questionnaires	30%
Upon submission and approval of the 1 st draft of full report on findings and recommendations	30%
Upon submission and approval of the Comprehensive Final Report (in hardcopies and digital format)	30%
Upon presentation of the d. Comprehensive Final Report (in powerpoint format) to the TPB Management Committee (MANCOM)	10%
TOTAL	100%

Note: The research/survey company should have a Landbank account. Payment will be made through LBP bank deposit. Otherwise, bank charges will be shouldered by the research/survey company.

TECHNICAL PROPOSAL:

Bidders shall be given 15 minutes to present their plan of approach for the project and shall be rated based on the following criteria with corresponding numerical weights:

	PARTICULARS		PERCENTAGE	RATING
I.	Quality of Personnel to be assigned to the Project			15%
	Profile and expertise of key personnel who will be assigned to the project, showing specialization in conducting quantitative and qualitative research in customer satisfaction.			
	<i>With a Statistician in the team that has an experience in conducting customer satisfaction surveys (15%)</i>			
	<i>Without a Statistician in the team but has experience in conducting customer satisfaction surveys (10%)</i>			
II.	Research/Survey Company's Experience and Capability			40%
	A.	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%	
		<i>With at least 5 years' experience in using different methodologies for reaching specific customer types and capacity to implement the survey in an international coverage. (20%)</i>		
		<i>With less than 5 years' experience in using different methodologies for reaching specific customer types and capacity to implement the survey in an international coverage. (0%)</i>		
	B.	Quality and quantity of similar surveys handled.	10%	
		<i>With 4 or more similar surveys (10%)</i>		
		<i>With 3 similar surveys (5%)</i>		
		<i>Less than 3 similar surveys (0%)</i>		
	C.	Quality / profile of previous clients in similar projects.	10%	
		<i>With 3 or more similar surveys and 1 government client (10%)</i>		
		<i>With 3 or more similar surveys but no government client (5%)</i>		
		<i>Less than 3 similar surveys (regardless if there is a government client or none) (0%)</i>		
III.	Plan of Approach and Methodology			45%

	PARTICULARS		PERCENTAGE	RATING
	A.	Consistency of the proposed workplans with the standard guidelines of GCG.	20%	
	B.	Project plan approach to achieve the deliverables/ expected outputs within the specified timeframes.	15%	
	C.	Manner of presenting the survey results and recommendations.	10%	
	TOTAL			100%

Hurdle rate for Technical Proposal: At least 85%

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

Proposal	Weight (%)
Technical	85
Financial	15
TOTAL	100