

TERMS OF REFERENCE (TOR)

PROCUREMENT OF THE SERVICES OF A RESEARCH/SURVEY COMPANY TO CONDUCT THE 2021 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, MICE and consumer 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 follow the *“Enhanced Standard Guideline on the Conduct of Customer Satisfaction Survey”*, as released by the GCG on 26 September 2019, for the implementation of the 2021 TPB Customer Satisfaction Survey.

DEFINITION OF TPB CUSTOMERS:

Exhibitors- private sector representatives who joined the travel trade fairs or domestic promotion events (e.g. Marine Diving Fair, Luxperience, World Travel Market, and Regional Travel Fair) that were either organized or supported by TPB. All of these customers are based in the Philippines.

Attendees- tourism stakeholders 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. These customers are a mix of Filipinos and foreigners living within or outside the Philippines.

SURVEY METHODOLOGY:

Below is the recommended survey methodology for the 2021 Customer Satisfaction Survey:

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

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. The report will be incorporated in the Quarterly Monitoring Report.

SAMPLE SIZE:

Indicatively, the sample size for the 2021 Customer Satisfaction Survey is projected to range from 300 to 500 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 +/-4.3%
- p = sample proportion

SCOPE OF WORK:

- a. Finalization of the sample size per customer type.
- b. Use of the GCG-prescribed 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. Conduct of at least one (1) Focus Group Discussion (FGD) with the satisfied and dissatisfied respondents to gather qualitative insights about the best practices of TPB, service areas for improvement, and other suggestions. The size and criteria for the FGD will be based on the recommendation of the research/survey company, subject to the approval of TPB.
- h. 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.
- i. 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 GCG-prescribed questionnaires will be provided upon request of the interested bidders.*
- c. Quarterly Monitoring Reports (2nd to 4th Quarter)
- d. Transcript/narrative of the conducted FGD
- e. Draft Survey Report on findings, analyses and recommendations.
- f. Comprehensive Final Report (3 hard copies and digital format)
 - ✓ Full report on findings and analysis as required by the GCG guideline
 - ✓ Insights gathered from the FGD, which will also be incorporated in the analysis
 - ✓ Conclusions and actionable recommendations to address the survey findings
 - ✓ Tabulation of aggregate data (excel format)
 - ✓ Sample accomplished survey forms (5 per customer type)
- g. Powerpoint Presentation of the Comprehensive Final Report

CONTENTS OF THE QUARTERLY MONITORING REPORTS:

ACTIVITY	DOCUMENTS FOR SUBMISSION
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

Note: The submission of the above reports and documents is dependent on the quarter applicable. For example, if the Pre-test was conducted on the 2nd Quarter, then the reports under it shall be included in the 2nd Quarter Monitoring Report.

APPROVED BUDGET FOR THE CONTRACT (ABC):

The 2021 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
26 April 2021	Kick-Off Meeting between the research/survey company and TPB representatives
29 April 2021	Submission of the Inception Report and Questionnaires (with inputs)- 1 st draft
03 May 2021	TPB’s submission of comments on the Inception Report and Questionnaires
06 May 2021	Submission of Inception Report and Questionnaires (with inputs)- 2 nd draft
10 May 2021	TPB’s submission of comments on the Inception Report and Questionnaires
12 May 2021	Submission of the Final Inception Report and Questionnaires
13 – 20 May 2021	Pilot-testing of the Questionnaires
25 May 2021	Submission of Pilot-testing results and finalized survey questionnaires
28 May 2021	TPB’s approval of the finalized survey questionnaires
31 May – 15 December 2021	Data collection proper
15 July 2021	Submission of the Quarterly Monitoring Report (Q2)
15 October 2021	Submission of the Quarterly Monitoring Report (Q3)
05 January 2022	Conduct of the Focus Group Discussion (FGD)
15 January 2022	Submission of the Quarterly Monitoring Report (Q4)
28 January 2022	Submission of the Draft Full Report- 1 st draft
11 February 2022	Submission of the Draft Full Report- 2 nd draft
28 February 2022	Submission of the Comprehensive Final Report (in hardcopies and digital format)

Date	Activities/ Deliverables
02 March 2022	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

TERMS OF PAYMENT:

The indicative payment scheme is as follows:

OUTPUT/MILESTONE	% OF PAYMENT
Upon submission and approval of the inception report and finalized survey questionnaires	15%
Upon submission and approval of the 2 nd Quarterly Monitoring Report	10%
Upon submission and approval of the 3 rd Quarterly Monitoring Report	10%
Upon submission and approval of the 4 th Quarterly Monitoring Report	10%

OUTPUT/MILESTONE	% OF PAYMENT
Upon submission and acceptance of the transcript/narrative of the conducted FGD	10%
Upon submission and acceptance of the 1 st draft of full report on findings and recommendations	15%
Upon submission and approval of the Comprehensive Final Report (in hardcopies and digital format)	20%
Upon presentation of the 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.

SHORTLISTING CRITERIA AND RATING SYSTEM:

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

	PARTICULARS	% WEIGHT
I.	Applicable Experience of the Research/Survey Company	50%
A.	At least 5 years of experience in conducting customer satisfaction surveys and related researches, including analysis and presentation.	30%
	<i>With more than 5 years of experience (30%)</i>	
	<i>With 5 years of experience (25%)</i>	
	<i>With less than 5 years of experience (0%)</i>	
B.	Successfully implemented similar projects within the last 5 years (minimum of 3 customer satisfaction survey-related projects, with at least 1 government client). <i>Based on submitted Certificates of Project Completion showing satisfactory delivery of service.</i>	15%
	<i>At least 3 customer satisfaction survey-related projects, with at least 1 government client (15%)</i>	
	<i>At least 3 customer satisfaction survey-related projects, but no government client (10%)</i>	
	<i>Less than 3 customer satisfaction survey-related projects (0%)</i>	

PARTICULARS		% WEIGHT
C.	Member of good standing in any internationally recognized association of marketing research agencies. <i>Bidder should provide proof of membership and/or certificate of good standing.</i>	5%
	<i>With membership in any internationally-recognized association of marketing research agencies (5%)</i>	
	<i>No membership in any internationally-recognized association of marketing research agencies (0%)</i>	
II.	Qualification of personnel who may be assigned to the project Note: Bidder to submit CV using TPF 6 Form which need not be notarized	30%
	All key personnel should have at least 3 years of work experience in conducting surveys or qualitative and quantitative research.	
	<i>All key personnel have more than 3 years of relevant work experience (30%)</i>	
	<i>All key personnel have 3 years of relevant work experience (25%)</i>	
III.	Current Workload relative to Capacity	20%
	The research/survey company is currently handling maximum of 10 projects.	
	<i>Currently handling 5 or less projects (20%)</i>	
	<i>Currently handling 6-10 projects (15%)</i>	
	<i>Currently handling more than 10 projects (0%)</i>	
	TOTAL	100%

Hurdle rate for Shortlisting: At least 85%

TECHNICAL PROPOSAL:

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

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

	PARTICULARS	% WEIGHT
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. Quantity of similar surveys handled.	10%
	<i>With more than 3 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 at least 3 similar projects and 1 government client (10%)</i>	
	<i>With at least 3 similar projects but no government client (5%)</i>	
	<i>Less than 3 similar projects (regardless if there is a government client or none) (0%)</i>	
III.	Plan of Approach and Methodology	45%
	A. Consistency of the proposed workplans with the standard guidelines of GCG.	20%

	PARTICULARS		% WEIGHT
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