

TERMS OF REFERENCE (TOR)

PROCUREMENT OF THE SERVICES OF A RESEARCH COMPANY TO PREPARE THE 2025 MARKET BRIEF AND MARKET UPDATE REPORTS

I. BACKGROUND

The Tourism Promotions Board (TPB), an attached agency of the Department of Tourism, is mandated to market and promote the Philippines domestically and internationally as a world-class tourist destination. It envisions the Philippines to become the preferred destination for sustainable, uniquely diverse, and experiential travel. With this goal, the TPB has continuously implemented programs, projects and activities that aim to position the Philippines as a top-of-mind destination, improve the perception of the country as a unique and safe destination, and ensure steady promotion of major tourist destinations across various media.

To prepare effective marketing strategies and provide direction to its promotional efforts, the TPB is eager to gather demographic and psychographic data about its key markets. Traditionally, demographic information, such as age, ethnicity, religious beliefs, occupation, and educational level, has been the primary data collected by many organizations to improve their products and services. However, in recent years, psychographics has become mainstream, changing the way data are collected, analyzed, and applied. Through psychographic data, organizations gain deeper insights on their target markets' psychological and emotional motivations and concerns, providing an understanding of how their markets' think and behave. By utilizing a combination of demographic and psychographic data, marketing efforts become more relevant, logical, and directed towards the right audience.

II. OBJECTIVES

In view of the above, the TPB, through the Corporate Planning and Business Development Department, would like to commission the services of a research company to conduct an annual market brief and quarterly market update reports, with the following objectives:

1. To be up to date with the changing psychographic profile of travelers and tourism trends, with additional demographic information;
2. To understand the changes in the motivations, concerns, and preferences of travelers;
3. To determine the current standing of the Philippines in terms of visitor arrivals among ASEAN countries; and
4. To gain insights on different market trends that directly or indirectly affect the propensity to travel

III. SCOPE OF WORK AND DELIVERABLES:

A. Geographical Coverage (Source Markets)

- | | | |
|---------------------------|--------------------|--|
| 1. Philippines (Domestic) | 7. China | 14. India |
| 2. Australia | 8. Japan | 15. Meetings, Incentive, Conference/Convention, and Exhibitions (MICE) |
| 3. Malaysia | 9. South Korea | 16. Special Section: Comparative Analysis of ASEAN countries |
| 4. Singapore | 10. Canada | |
| 5. Taiwan | 11. USA | |
| 6. Hong Kong | 12. Germany | |
| | 13. United Kingdom | |

B. Preparation of the Annual Market Brief

The Market Brief aims to provide an updated profile of the Top 13 Source Markets of the Philippine Inbound Tourism, along with the domestic market. It is an annual report (book-type) that contributes information and statistics about traveler sentiments and psychographics, travel outlook, and visitor arrivals.

The research company is expected to perform the following functions:

1. Data Gathering and Consolidation

Data Gathering Methods:

Desk research on existing primary and secondary sources of travel and tourism data. Information to be included in the reports should come from reputable market research providers and news media sites.

Report Coverage (all international source markets except the Philippines):

SECTION	RECOMMENDED SOURCES
I. Demography <ul style="list-style-type: none"> - Total Population and % Growth - Other population data and trends 	CIA World Factbook Official Statistics Agency of the Source Market Credible academic websites and other reputable resources that provide reliable data
II. Consumer Values and Behaviors <ul style="list-style-type: none"> - Consumer habits and likes & dislikes, particularly preferences based on cultural norms, practices, attitudes, sustainability concerns, and emotional motivations that influence travel choices. - Travel segmentation by income and age bracket 	YouGov's Global Travel Profiles (Data to be provided by TPB) Credible academic websites and other reputable resources that provide reliable data
III. Digital Consumption Overview <ul style="list-style-type: none"> - Number of internet users and social media users. - Daily time spent using the Internet - Main reasons for using the Internet - Main reasons for using social media - Favorite social media platforms - Sources of Brand Discovery 	We Are Social- Digital January 2025 Credible academic websites and other reputable resources that provide reliable data
IV. Outbound Travel Trends <ul style="list-style-type: none"> - Travel intention in the coming months - Sources of travel inspiration and information - Key travel motivators - Leading factors considered when planning travel/in conducting travel 	YouGov's Global Travel Profiles (Data to be provided by TPB)

SECTION	RECOMMENDED SOURCES
<ul style="list-style-type: none"> - Booking patterns and preferred platforms - Activities to be conducted at the destination - Possible length of stay (number of nights) - Possible average expenditure per day (in USD) - Preferred destinations - Propensity to conduct MICE, business, corporate, or bleisure travel 	Credible academic websites and other reputable resources that provide reliable data
<p>V. MICE and Business Travel (examination of the demand for meetings, incentives, conferences, and exhibitions (MICE), as well as business and bleisure travel trends)</p> <ul style="list-style-type: none"> - Key considerations in choosing MICE destinations and venues - Preferred MICE destinations - Key Issues and Challenges 	Credible academic websites and other reputable resources that provide reliable data
<p>VI. Arrivals to ASEAN</p> <ul style="list-style-type: none"> - 2019-2024 arrivals (with emphasis on the ranking of the Philippines) 	Data to be provided by TPB
<p>VII. Arrivals to the Philippines</p> <ul style="list-style-type: none"> - 2019-2024 Arrivals to the Philippines - Profile of Travelers to the Philippines 	Department of Tourism's Report on Visitor Arrivals by Country of Residence
VIII. Key Takeaways	
IX. Recommended Marketing Strategies	

Report Coverage (the Philippines only):

SECTION	RECOMMENDED SOURCES
<p>I. Demography</p> <ul style="list-style-type: none"> - Total Population and % Growth - Other population data and trends 	<p>CIA World Factbook Philippine Statistics Authority</p> <p>Credible academic websites and other reputable resources that provide reliable data</p>
<p>II. Consumer Values and Behaviors</p> <ul style="list-style-type: none"> - Consumer habits and likes & dislikes, particularly preferences based on cultural norms, practices, attitudes, sustainability concerns, and emotional motivations that influence travel choices. - Travel segmentation by income and age bracket 	<p>YouGov's Global Travel Profiles (Data to be provided by TPB)</p> <p>Credible academic websites and other reputable resources that provide reliable data</p>
<p>III. Digital Consumption Overview</p> <ul style="list-style-type: none"> - Number of internet users and social media users. - Daily time spent using the Internet - Main reasons for using the Internet - Main reasons for using social media - Favorite social media platforms 	<p>We Are Social- Digital January 2025</p> <p>Credible academic websites and other reputable resources that provide reliable data</p>

SECTION	RECOMMENDED SOURCES
- Sources of Brand Discovery	
IV. Contribution of Tourism to the Economy Key Economic Indicators of Tourism in the Philippines <ul style="list-style-type: none"> - Tourism Direct Gross Value Added - Tourism-related employment - Domestic Tourism Expenditure - Other insights from the Philippine Tourism Satellite Accounts (PTSA) Report 	Philippine Statistics Authority
V. Travel Trends-Psychographics <ul style="list-style-type: none"> - Travel intention and statistics in the coming months - Sources of travel inspiration and information - Key travel motivators - Leading factors considered when planning travel/in conducting travel - Booking patterns and preferred platforms - Activities to be conducted at the destination - Possible length of stay (number of nights) - Possible average expenditure per day (in USD) - Preferred destinations 	YouGov's Global Travel Profiles (Data to be provided by TPB) Credible academic websites and other reputable resources that provide reliable data
VI. MICE and Business Travel (examination of the demand for meetings, incentives, conferences, and exhibitions (MICE), as well as business and bleisure travel trends) <ul style="list-style-type: none"> - Key considerations in choosing MICE destinations and venues - Preferred MICE destinations - Key Issues and Challenges 	Credible academic websites and other reputable resources that provide reliable data
VII. Key Takeaways	
VIII. Recommended Marketing Strategies	

Report Coverage (MICE):

SECTION	RECOMMENDED SOURCES
I. Meetings <ul style="list-style-type: none"> - Global trends - Regional/ASEAN comparison - Considerations for selecting meeting event destinations and venues - Preferred destinations for meeting events - Profile of participants - Industries with companies that conduct Regional and Overseas meetings - Key issues and opportunities 	International Congress and Convention Association (ICCA) Credible academic websites and other reputable resources that provide reliable data
II. Incentive Travel <ul style="list-style-type: none"> - Global trends 	Incentive Research Foundation

SECTION	RECOMMENDED SOURCES
<ul style="list-style-type: none"> - Regional/ASEAN comparison - Considerations for selecting incentive travel destinations - Preferred destinations for incentive travel - Industries that implement incentive travel - Profile of participants - Considerations for selecting Destination Management Companies (DMCs) - Key issues and opportunities 	<p>American Express (AMEX) Meetings and Events</p> <p>Credible academic websites and other reputable resources that provide reliable data</p>
<p>III. Conference/Convention</p> <ul style="list-style-type: none"> - Global trends - Regional/ASEAN comparison - Considerations for selecting conference/convention destinations and venues - Preferred destinations for conferences/conventions - Industries and associations that regularly hold international conferences / conventions - Profile of participants - Considerations for selecting Professional Congress Organizers (PCOs) - Key issues and opportunities 	<p>International Congress and Convention Association (ICCA)</p> <p>Credible academic websites and other reputable resources that provide reliable data</p>
<p>IV. Exhibition</p> <ul style="list-style-type: none"> - Global trends - Regional/ASEAN comparison - Considerations for selecting destinations and venues for exhibitions - Preferred destinations for exhibitions - Industry sources in Exhibitions - Profile of participants - Suppliers of Exhibition Organizers - Consideration for selecting Professional Exhibition Organizers (PEOs) - Key issues and opportunities 	<p>The Global Association of the Exhibition Industry (UFI)</p> <p>Credible academic websites and other reputable resources that provide reliable data</p>
<p>V. Key Takeaways</p>	
<p>VI. Recommended Marketing Strategies</p>	

Report Coverage (Special Section: Comparative Analysis of ASEAN Countries)

SECTION	RECOMMENDED SOURCES
<p>I. 2019 to 2024 Visitor Arrivals</p> <p>II. Cost of Traveling</p> <p>III. Marketing Initiatives</p> <p>IV. MICE Market Potential</p> <ul style="list-style-type: none"> - Current & Forecasted Demand - Industry segmentation 	<p>ASEAN’s National Tourism Offices (NTOs)</p> <p>ASEAN’s Convention Bureaus</p>

SECTION	RECOMMENDED SOURCES
<ul style="list-style-type: none"> - Economic Impact and Contribution to GDP and tourism, including forecast <p>V. MICE Competitiveness</p> <ul style="list-style-type: none"> - Infrastructure readiness (e.g. venues, facilities, technology, and accessibility) - Government and institutional support (existing policies, subsidies, and future initiatives) - Affordability compared to other MICE hubs in the region in terms of conducting MICE events - Sustainability and innovation practices 	Credible academic websites and other reputable resources that provide reliable data

Note: The research company may include additional information as they deemed relevant and available, subject to the approval of TPB.

2. Data analysis and interpretation

- Ensure that the reports are factual, accurate, and precise, with data relevant to TPB’s mandate of marketing and promoting the Philippines as a preferred tourism destination.

3. Report writing requirements

- Include infographics, charts, and tables to effectively present data and figures.
- Maintain a concise narrative with a relatively academic presentation style.

4. Proofreading

- Ensure that the reports are free from orthographical and grammatical errors.
- Ensure that the contents are comprehensive.

5. Design and layout of the report

- Provide design and layout for the following elements:
 - a. Front and back cover
 - b. Disclaimer Statement (contents provided by TPB)
 - c. Table of Contents
 - d. Section Titles
 - e. Contents of the reports
- Use color combinations that enhance the report's aesthetics while improving the readability of the content.

6. Printing of the Market Brief

- Upon approval of the Market Brief, the report will be printed and softbound.

PARTICULARS	SPECIFICATIONS
Quantity	40 Market Brief books
Size	Folded: 8.25" (w) x 11.75" (h) Spread: 16.5" (w) x 11.75" (h)
Color Requirement	Cover: Full Color plus matt lamination x 0 Pages: Full color both sides
Material Preference	Matt coated 220 lbs. (Cover) Book paper 80 lbs. solid white (inside pages)

PARTICULARS	SPECIFICATIONS
Printing Process	Digital, back-to-back printing
Binding	Smyth-sewn with perfect binding
Font	Calibri

Note: The design of the Market Brief is subject to approval of the TPB prior to printing and soft binding.

C. Preparation of Market Update Reports

The Market Update Reports aim to provide information and insights regarding changing market trends and travel outlook, including activities in other ASEAN countries.

Data Gathering: Desk research on existing primary and secondary sources of travel and tourism data. Information to be included in the reports should come from reputable market research providers and news media sources.

Report Coverage:

SECTION	RECOMMENDED SOURCES
I. Market Trends <ul style="list-style-type: none"> - Economic Update/Situation (e.g. economic growth, inflation, employment rate, consumer income and spending) - Digital (e.g. internet and social media users, top social media and mobile apps, top search trends, top travel influencers) - Lifestyle (e.g. leisure, recreation, and vacation habits, shopping trends, consumer values and behavior) 	Official Government Websites Credible news media sources Credible academic websites and other reputable resources that provide reliable data
II. Travel Outlook¹ of the Source Market <ul style="list-style-type: none"> - Travel behavior and sentiments - Key travel motivators - Leading considerations in conducting travel - Source of travel inspiration and information - Activities to be undertaken at the travel destination - Booking patterns and preferred platforms - Preferred destinations - Propensity to conduct MICE, business, corporate, or leisure travel <p>¹Outbound travel outlook for international source markets ¹Domestic travel outlook for the Philippine market</p>	YouGov's Global Travel Profiles (Data to be provided by TPB) Credible academic websites and other reputable resources that provide reliable data
III. Competitors' Information <ul style="list-style-type: none"> - Tourism-related efforts being implemented by ASEAN countries (excluding the Philippines) to attract travelers from specific source markets/countries or to increase overall foreign visitor arrivals 	Websites of ASEAN's National Tourism Offices (NTOs) Credible news media sources

SECTION	RECOMMENDED SOURCES
	Credible academic websites and other reputable resources that provide reliable data

IV. PROJECT IMPLEMENTATION SCHEDULES:

Below is the indicative schedule of activities:

Date	Activities/ Deliverables
04 May 2025	Kick-Off Meeting between the research company and TPB representatives
07 May 2025	Submission of Inception Report (1 st draft)
15 May 2025	Submission of Inception Report (2 nd draft)
25 May 2025	TPB's approval of the inception report
Market Brief:	
29 May 2025	TPB's sharing of travel and tourism data
01 June – 31 August 2025	Data gathering, analysis and interpretation, and report writing
24 June 2025	Submission of initial report for 1 market and proposed design and layout for front and back cover, disclaimer statement, section titles, and contents
01 July 2025	TPB's submission of inputs regarding the initial report and proposed design and layout
01 September 2025	Submission of Market Brief (1 st draft)
16 September 2025	Submission of Market Brief (2 nd draft)
01 October 2025	Submission of Market Brief (3 rd draft)
10 October 2025	TPB's approval of the Market Brief
17 October 2025	Submission of 1 st print proof of the Market Brief
23 October 2025	Submission of 2 nd print proof of the Market Brief
17 November 2025	Submission of the printed copies of the Market Brief
Market Update Reports:	
10 December 2025	Submission of the 1 st set of Market Update Reports (drafts are subject to review and approval)
10 March 2026	Submission of the 2 nd set Market Update Reports (drafts are subject to review and approval)

V. ADDITIONAL TECHNICAL REQUIREMENTS

QUALIFICATIONS OF THE RESEARCH COMPANY:

1. The research company should possess at least five (5) years of experience in conducting consumer insighting research, and related projects.

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

For completed government contracts, the research company must attach a Certificate of Project Completion as a supporting document. For completed private contracts, the research company may submit proof of full payment received (e.g. official receipts) or a signed performance evaluation form as alternative supporting documents in case the Certificate of Project Completion is not available.

For ongoing contracts, the research company must attach Notice of Award, Notice to Proceed, or Contract Agreement, whichever is available.

2. Member in any internationally recognized association of marketing research agencies (*provide proof of membership*).
3. All key personnel to be assigned to the project should meet the minimum required years of relevant work experience in conducting research. *Curriculum vitae of all key personnel must be submitted.*

Essential Team Members	Minimum No. of Experience	Educational Background
Project Manager / Team Leader	At least 5 years	Should be graduates of either of the following:
Assistant Project Manager	At least 5 years	
Data Researchers and Analysts (at least 2 personnel)	At least 3 years	<ul style="list-style-type: none"> • Marketing • Economics • Tourism Management • Communication • Business Administration
Report Editor	At least 3 years	
Graphic Designer	At least 3 years	

VI. TERMS AND CONDITIONS:

1. The TPB shall have full ownership of all the data gathered and analyzed (both in hard and softcopy files) for the project.
2. All records are regarded as confidential and therefore should not be divulged to any third party other than the research company, unless legally required to do so by the appropriate authorities. The TPB has the right to request sight of, and copies of any and all records kept, on the proviso that the research company is given reasonable notice of such a request.
3. The research company is required to sign a Non-Disclosure Agreement with the TPB in view of the data and figures that the TPB will share from its subscription to a travel and tourism platform/database.

VII. 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 agencies are as follows:

PARTICULARS		PERCENTAGE	RATING
I.	Applicable Experience of the Research Company		50%
A.	At least 5 years of experience in conducting consumer insighting surveys and related research studies.	30%	
	- <i>With at least 5 years of experience (30%)</i>		
	- <i>With less than 5 years of experience (0%)</i>		
B.	Successfully implemented similar projects within the last 5 years (minimum of 3 consumer insighting research-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 consumer insighting research-related projects, with at least 1 government client (15%)</i>		
	- <i>At least 3 consumer insighting research-related projects, but no government client (10%)</i>		
	- <i>Less than 3 consumer insighting research-related projects (0%)</i>		
C.	Member in any internationally recognized association of marketing research agencies. <i>Bidder should provide proof of membership.</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		30%
A.	All key personnel to be assigned to the project should meet the minimum required years of relevant work experience in conducting research studies	20%	
	<i>All key personnel have at least 3 years of relevant work experience (20%)</i>		
	<i>Some or all key personnel have less than 3 years of relevant work experience (0%)</i>		
B.	Specified key personnel (Project Manager / Team Leader, Assistant Project Manager, and Data Researchers & Analysts) should meet the required educational background	10%	
	<i>All specified key personnel have met the required educational background (10%)</i>		
	<i>Some or all specified key personnel have not met the required educational background (0%)</i>		
III.	Current Workload relative to Capacity		20%
A.	The research company is currently handling a maximum of 10 projects.		
	- <i>Currently handling 5 or less projects (20%)</i>		
	- <i>Currently handling 6-10 projects (15%)</i>		

PARTICULARS		PERCENTAGE	RATING
	- Currently handling more than 10 projects (0%)		
TOTAL			100%

Hurdle rate for Shortlisting: At least 85%

VIII. TECHNICAL RATING:

Bidders are required to present their plan of approach for the project (maximum of 15 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		PERCENTAGE	RATING
I.	Quality of Personnel to be assigned to the Project		30%
A.	Profile and expertise of key personnel who will be assigned to the project, demonstrating specialization in conducting insightful research and analysis.		
	<i>With more than two (2) Data Researchers and Analysts in the team (30%)</i>		
	<i>With two (2) Data Researchers and Analysts in the team (25%)</i>		
	<i>With less than two (2) Data Researchers and Analysts in the team (0%)</i>		
II.	Research Company's Experience and Capability		30%
A.	At least 5 years of experience in conducting consumer insightful surveys and related research studies.	15%	
	- <i>With at least 5 years of experience (15%)</i>		
	- <i>With less than 5 years of experience (0%)</i>		
B.	Quantity/ profile of previous clients in similar projects.	15%	
	- <i>With at least 3 similar projects and 1 government client (15%)</i>		
	- <i>With at least 3 similar projects but no government client (10%)</i>		
	- <i>Less than 3 similar projects (regardless if there is a government client or none) (0%)</i>		
III.	Plan of Approach and Methodology		40%
A.	Consistency of the proposed workplan with the Scope of Work indicated in the TOR	15%	
B.	Plan approach to achieve the deliverables/ expected outputs within the specified project duration	15%	
C.	Proposed presentation/look of the market update reports and market brief	10%	
TOTAL			100%

Hurdle rate for Technical Proposal: At least 85%

The bidders are expected to submit both 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

IX. APPROVED BUDGET FOR THE CONTRACT:

This project will be undertaken for a total amount of **Two Million Pesos Only (Php2,000,000.00)**, inclusive of all applicable taxes and fees.

TPB reserves the right to withhold all or a portion of payment if performance is unsatisfactory, if the work/output is incomplete, not delivered, or fails to meet the set deadline/s.

X. TERMS OF PAYMENT:

The indicative payment scheme is as follows:

Output/Milestones	% of Payment
Upon approval of the Inception Report and submission of the 1 st draft of the Market Brief	15%
Upon approval and printing of the Market Brief	35%
Upon submission and approval of the Market Update Reports (1 st set)	25%
Upon submission and approval of the Market Update Reports (2 nd set)	25%
TOTAL	100%

Note: *The research company is encouraged to have a Landbank account. Payment shall be made through LBP bank deposit. Otherwise, bank charges shall be shouldered by the research company.*