

TERMS OF REFERENCE

- I. **BIDDER** : Market Research and Consulting Services
- II. **PROJECT TITLE** : Research on Voluntourism
- III. **BACKGROUND**

The Office of Product and Market Development (OPMD) continues to identify and develop new tourism products in support of the efforts of the Department to revitalize the tourism sector amid the pandemic. Voluntourism—a combined act of tourism and volunteering is one of the products identified by OPMD. This can be undertaken by foreign or local tourists which is timely and relevant as the Department pivots to domestic tourism while international travel restrictions are still enforced.

Voluntourism is one of the fastest-growing tourism niche markets in the world and can be a powerful tool for tourism and community development. Globally, more than 10 million voluntourists are estimated to have spent between USD 1.6 to 2.8 billion in 2016. However, there is little information about this niche sector in the APEC region including the challenges and opportunities that voluntourism brings to member economies. (www.apec.org)

The Philippines is being positioned by International NGOs as a volunteer destination with a tropical climate, beautiful islands, unique culture, and hospitable people which enabled the country to receive volunteers from different countries before the pandemic where building community facilities topped the activities participated in by the volunteers.

IV. **OBJECTIVES**

The OPMD will conduct in-depth research on voluntourism to understand the industry, stakeholders, and communities involved so an action plan/voluntourism model can be drawn. It will serve as a guide in developing and promoting voluntourism as a tourism product that will contribute to the recovery of the local tourism industry.

The action plan and voluntourism model can also guide LGUs, tourism enterprises, and business organizations when organizing volunteering sessions to prepare visitors and the communities for tourism-inspired volunteering work.

V. **MINIMUM REQUIREMENTS FOR SUPPLIER**

- Must be a market research and/or consulting agency specializing in the conduct of custom research for local and international organizations; and
- Must be registered with the Philippine Government Electronic Procurement Systems (PhilGEPS)

VI. REQUIRED PERSONNEL

Required Personnel	Minimum Years of Experience
1. Account Director / Principal Investigator	5 years
2. Research Manager/ Co-PI	3 years
3. Research Executive / Sub-Investigator	3 years
4. Data Analyst / Statistician	2 years

***Note:** Bidders may recommend additional personnel deemed fit for the team.

Personnel Responsibilities

Account Director / Principal Investigator

- Manage and supervise the entire team;
- Provide overall direction, plan the budget, set up project goals, and ensure understanding of end-user requirements;
- Serve as the key point of contact for coordination between the agency and the end-user;
- Ensure the timely delivery of data and reports;
- Oversee project set up and implementation of the research plan;
- Ensure accuracy and quality of data and reports;

Research Manager/ Co-Principal Investigator (Co-PI)

- Conceptualize and suggest the most appropriate research methodologies and techniques;
- Design research plan and questionnaires;
- Implement research plan;
- Oversee data interpretation, report writing, and recommendation crafting;
- Present findings by phase and final report to end-user;

Research Executive / Sub-Investigator

- Assist the Research Manager in implementing the research plan;
- Collect data through interviews, surveys, and other appropriate tools;
- Perform valid and reliable desk research;
- Interpret data and consolidate information into reports/presentations;

Data Coordinator/ Statistician

- Assist in the collection of data through interviews, surveys, and other appropriate tools;
- Assist in the conduct of valid and reliable desk research;
- Assist in interpretation of data and consolidation information into reports/presentations

VII. SCOPE OF WORK and DELIVERABLES

A. Activities:

- Literary review and secondary data gathering
- Refining of the survey instrument and methodology
- Development of case studies on Philippine destination communities previously engaged in volunteering work involving non-residents
- In-depth interviews with LGUs in voluntourism destinations
- Data gathering
- Data Processing
- Data Analysis
- Write Summary report per research phase
- Write a comprehensive report with Action Plan
- Presentation of the final report to DOT Officials and Stakeholders (Firm and DOT to identify and invite relevant stakeholders)

B. Deliverables

- Summary report of the research phase
- Regional Competitor Analysis of the Philippines with at least two Southeast Asian countries to include data on the following:
 - Number of volunteer tourist arrivals per year in the past 3 years (2017-2019)
 - Voluntourism products and services offered
 - Average daily expenditure of volunteers in the past 3 years
 - Marketing campaigns for voluntourism undertaken in the past 3 years
 - Voluntourism programs and policies in the past 3 years
 - Source markets for voluntourism
 - Market forecast based on growth
 - International NGOs or Voluntourism associations active in sending volunteers around the world
- Case Studies on Voluntourism in the Philippines
 - Five (5) Case Studies on Voluntourism in the Philippines. The case studies should represent the variety of voluntouring activities in the Philippines
 - Based on the Case Studies, a report on the nature and status of voluntourism in the Philippines. The report shall include:
 - Description of areas typically visited by volunteer tourists
 - Description of items and activities (e.g., purchases, experience, services, duration of activities) that constitute voluntourism product
 - General Profile (i.e., travel characteristics demographics) of local and foreign volunteers in the Philippines
 - Description of businesses and organization (local and international) and their involvement in voluntourism

- Involvement of DOT Regional Offices, Local Government Units, and Stakeholders in voluntourism
 - Impact of crisis (i.e., COVID-19) and disasters (e.g., typhoons, earthquakes) on voluntourism in the Philippines
 - Other information to guide the formulation of voluntourism framework and action plan in the Philippines
- Voluntourism Model for the Philippines that will serve as a guide for local tourism officers to organize volunteer tourism activities that are cognizant of:
 - A definition of voluntourism in the Philippine context
 - A Framework to describe how voluntourism works in the Philippine context
 - The effects of volunteering;
 - Preparations required for destination communities;
 - Planning needed to make volunteering and tourism meaningful for both the tourists and the host community: and
 - A sample voluntourism program in an identified site.

C. Survey Methodology

The research project may be divided into three (3) phases:

Phase 1. The first phase will be dedicated to developing five (5) case studies and in-depth interviews with LGU personnel involved in the volunteering activities. Site visits are required in developing the case studies. OPMD-Education and/or other DOT authorized representatives will join the research team in 1-2 of their site visits. The case studies can include volunteering for cultural and historical activities, medical assistance, education, ecological conservation, and other emerging forms of volunteering in the Philippines.

Phase 2. The second phase will involve activities to develop a volunteer tourism framework based on the cases and recommend the trajectory (i.e., research agenda, future research, recommendations) for advancing volunteer tourism in the Philippines. An Onsite/online workshop with researchers and key informants will be organized to validate the findings and recommendations.

Phase 3. The third phase will be dedicated to writing the manuscript to come up with the final report for submission to DOT. It will then be distributed to LGUs and Regional offices to guide them when organizing volunteer tourism to benefit their constituent communities.

The abovementioned methodologies will be acceptable to DOT, but the market research and consulting firm may recommend other methodologies that can better serve the purpose of the study, subject to the DOT's approval.

All data gathered should be submitted together with the reports as appendices. The DOT shall have full ownership of the data gathered and presented from the study.

VIII. PROJECT DURATION AND BUDGET

1. The research shall commence upon the receipt of the Notice to Proceed and should be completed within 5 months.
2. The Approved Budget for the Contract (ABC) for the project is **FOUR MILLION PESOS (PhP4,000,000.00)** inclusive of all applicable government taxes and charges, professional fees, bank charges, and other fees that may be incurred in the process.
3. Note that this consulting contract shall be a fixed-price contract.
4. All manuals, reports, materials, databases, questionnaires, references, etc. acquired through the conduct of the survey research shall be turned over to DOT after the undertaking.

IX. PAYMENT SCHEMES/SCHEDULE

Payment to the winning bidder will be made upon completion of the following milestones:

Milestone	% of Payment
Upon approval of survey methodology, the sample size of respondents, and research design	20%
Upon submission and acceptance of the report on the five (5) voluntourism case studies	20%
Upon submission and acceptance of the report on findings and recommendations for Phase 2	30%
Upon submission and acceptance of the final comprehensive report and presentation to the DOT	30%
Total	100%

X. CRITERIA FOR RATING

1. Stage 1 – Submission of eligibility documents
 2. Stage 2 – Shortlisted bidders must submit brief company credentials and proposed market research plan together with the technical and financial proposal
- A. Eligibility Check and Shortlisting Criteria for Rating

Applicable Experience of the Consultant – 60 pts.

Qualification of Personnel Assigned – 30 pts.

Current Workload Relative to Capacity – 10 pts.

I.	Applicable experience of the consultant	
A.	Relevance of the company portfolio to the project	
1.	Bidder has conducted at least 3 research projects.	20 pts.
	Bidder has conducted 1-2 research projects.	10 pts.
	ADDITIONAL - Bidder has conducted at least 2 tourism-related research projects*	5 pts
B.	Years of experience	
1.	Bidder has at least 5 years of experience conducting research or consulting projects.	20 pts.
	Bidder has 3 to 4 years of experience conducting research or consulting projects.	10 pts.
C.	Past clients	
	Bidder has completed 2 or more market or tourism research/planning projects with a contract cost equal to or greater than P2,000,000.00.	15 pts.
	Bidder has completed 1 market or tourism research/planning project with a contract cost equal to or greater than P2,000,000.00.	10 pts.
II.	Qualification of personnel assigned	
	All assigned personnel have experience working on at least 2 research projects.	30 pts.
	At least 3 of assigned personnel have experience working on at least 2 research projects.	20 pts.
III.	Current workload relative to capacity	
	Bidder has 1 to 3 ongoing projects with contract costs equal to or greater than the Approved Budget for the Contract (ABC).	10 pts.
	Bidder has no ongoing projects with contract costs equal to or greater than the ABC.	5 pts.
	Total	100 pts.
	Passing Score	70 pts.

*Need supporting documents for additional points (Certificate of Completion)

B. Technical Bid Criteria for Rating

Qualification of personnel to be assigned – 70 pts.

Plan of approach and methodology – 15 pts.

Experience and capability of the firm – 15 pts.

I.	Qualification of personnel to be assigned	
A.	Educational background	
1.	The Principal Lead has a Master's degree	20 pts.

	The Project Lead has a Bachelor's degree.	10 pts.
2.	At least 2 of the assigned personnel (aside from Project Lead) have Master's degrees	15 pts.
	Only 1 of the assigned personnel (aside from Project Lead) has a Master's degree	10 pts.
	All assigned personnel (aside from Project Lead) have Bachelor's degrees.	8 pts.
B.	Professional Experience	
1.	At least 2 of assigned personnel have been involved in the implementation of at least 1 research/study / or survey on voluntourism	20 pts.
	Only 1 of assigned personnel has been involved in the implementation of at least 1 research/study / or survey on voluntourism	15 pts.
2.	At least 3 assigned personnel have membership in at least 1 research-related professional society or association.	15 pts.
	1 to 2 assigned personnel have membership in at least 1 research-related professional society or association.	10 pts.
II.	Plan of approach and methodology	
A.	The substance of the proposal	
1.	The proposal thoroughly discusses the proposed approach and methodologies to be used in the study.	5 pts.
2.	The proposal thoroughly discusses the proposed data collection methods to be used in the study.	10 pts.
III.	Experience and capability of the firm	
	Bidder has implemented at least 3 similar contracts (contracts that involve market research/surveys/studies in any sector)	10 pts.
	Bidder has implemented at least 2 similar contracts (contracts that involve market research/surveys/studies in any sector).	8 pts.
	Bidder has implemented 1 similar contracts (contracts that involve market research/surveys/studies in any sector).	5 pts.
	ADDITIONAL – Bidder has implemented 1 market research/survey/study contract for LGU or government agencies.*	5 pts.
	Total	100 pts.
	Passing Score	70 pts.

*Need supporting documents for additional points (Certificate of Completion)

XI. CONTACT PERSONS



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APPROVED BY:


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