



Part B: - SCOPE OF WORK - SAT Tender 199/22- GLOBAL DISTRIBUTION CHANNEL & COMPETITOR LANDSCAPE

Bid Description	
Global Distribution Channel & Competitor Landscape for South African Tourism	
Bidder Name:	
CSD MAA number	MAAA
Tender Number:	SAT Tender Number 199/22
Closing Time:	14h00 (South African Time)
Closing Date:	08 March 2022 (No late submission will be accepted)
Compulsory Briefing Session:	Yes
Date of the Compulsory Briefing Session	18 February 2022 at 14h00 (South African Time)
Briefing Session Meeting link	https://meet.google.com/xgf-gjtm-fbx
Contact Person	Lerato Segomotso
Bid Submission Address	<p>https://forms.gle/5dGrnphK4ePteukMA</p> <p>Should bidders encounter any issues, queries must be directed in writing to tenders@southafrica.net</p> <p>Bidders are required to complete all the fields before making a submission, on the link before uploading a PDF version of the full proposal, the details are as follows: Bidder/Company name, bidder's representative, contact details (email and mobile) then a fully completed bid documents, signed and initial page, relevant supporting documents for uploads.</p> <p>No tenders transmitted by telegram, hand delivery telex, facsimile, e-mail, or similar apparatus will be considered.</p>

	<p>https://forms.gle/QGdwGpHtDbq3nWAK8</p> <p>Should bidders encounter any issues, queries must be directed in writing to tenders@southafrica.net</p> <p>Bidders are required to complete all the fields before making a submission, on the link before uploading a PDF version of the full proposal, the details are as follows: Bidder/Company name, bidder's representative, contact details (email and mobile) then a fully completed bid documents, signed and initial page, relevant supporting documents for uploads.</p> <p>No tenders transmitted by telegram, hand delivery telex, facsimile, e-mail, or similar apparatus will be considered.</p>
Section	Supply Chain Management
Contact Person	Lerato Segomotso
Email Address	tenders@southafrica.net

ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS - (NOT TO BE RE-TYPED)

THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC), AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF THE CONTRACT

Index **Page**

1	CLOSING DATE	3
2	TENDER SUBMISSION LINK	3
3	CONTACT AND COMMUNICATION	4
4	BACKGROUND	4
5	SCOPE OF WORK	5

1 CLOSING DATE

The closing date for the submission of proposals is **08 March 2022 at 14:00 (South African Time)**. No late submissions will be accepted.

2 TENDER SUBMISSION LINK

2.1 Bidders must submit their proposal using the below link.

<https://forms.gle/QGdwGpHtDbq3nWak8>

Should bidders encounter any issues with the submission link, queries must be directed in writing to tenders@southafrica.net

Bidders are required to complete all the fields before making a submission, on the link before uploading a PDF version of the full proposal, the details are as follows: Bidder/Company name, bidder's representative, contact details (email and mobile) then a fully completed bid documents, signed and initial page, relevant supporting documents for uploads.

No tenders transmitted by telegram, hand delivery telex, facsimile, e-mail, or similar apparatus will be considered.

All bidders should therefore take note that the physical drop-offs and courier of bid responses to South African Tourism's physical address is no longer permitted.

Prospective tenderers must periodically review both <http://www.southafrica.net/gl/en/corporate/page/tenders> for updated information or amendments about this tender, before due dates.

2.2 Failure on the part of the tenderer to sign/mark this tender form and thus to acknowledge and accept the conditions in writing or to complete the attached forms, questionnaires, and specifications in all respects, may invalidate the tender.

2.3 Tenders document must be completed in black ink where mechanical devices, e.g., typewriters or printers, are not used.

- 2.4 Tenderers will check the numbers of the pages and satisfy themselves that none are missing or duplicated. No liability will be accepted regarding claims arising from the fact that pages are missing or duplicated.

3 CONTACT AND COMMUNICATION

- 3.1 A nominated official of the bidder(s) can make enquiries in writing to the specified person, Lerato Segomotso via email [at tenders@southafrica.net](mailto:tenders@southafrica.net). Bidder(s) must reduce all telephonic enquiries to writing and send to the above email address.
- 3.2 Bidders are to communicate any technical enquiries through the nominated official in writing, no later than 22 February 2022 @14h00.

All responses (addendum with Questions and Answers) will be communicated with all attendees of the compulsory briefing sessions on or before 28 February 2022

3.3. VALIDITY PERIOD

The tender proposal must remain valid for at least five (5) months after the tender due date. All contributions /prices indicated in the proposal and other recurrent costs must remain firm for the period of the contract.

3.4. DURATION OF THE CONTRACT

South African Tourism intends to enter into a thirty-six (36) month contract and service level agreement with the successful bidder(s). The contract will also be subject to a periodic performance evaluation on agreed terms and conditions unless the parties agree otherwise

4 BACKGROUND

COVID pandemic has had a negative impact on destinations; most travel products and distribution channels were impacted adversely by this pandemic; many have closed their doors or ceased to be a viable channel for travel while others minimised their cost or placed their business on pause until the travel industry becomes viable again.

SA Tourism's Insights and Analysis department is looking to access specific, credible, reliable, and constantly updated travel information on the travel agency, ticketing agents, bookings for air tickets, bookings for accommodation and read into GDS information. This view is required for both travels to South Africa and key competitors.

South Africa is looking to recover the tourism sector with precision data that will inform the value proposition required for rapid tourist growth, greater targeting accuracy and partner with distribution partners that are in the best position to support these intentions speedily and cost-effectively.

Distribution Channel Landscape

There are many unknowns with bi-lateral travel agreements, vaccine passports, regional travel blocks (corridors), countries added and removed from safelists as the COVID-19 situation changes. Keeping abreast of the shifts in the space has been extremely challenging and makes planning near impossible with the number of moving parts.

SA Tourism would like to establish what has changed since the pandemic. Is the brick-and-mortar traditional travel agent still relevant to post-corona travellers? Have there been shifts in booking in an online environment? How do cancellation policies affect booking in these uncertain times? Where and how do consumers book for domestic, short-haul, and

long-haul travel? Which competitors are seeing rapid growth, and how can South Africa access best practices to compete for tourists and delegates, enhance strategy and campaigns to grow market share, identify new segments?

Competitor Landscape

There have been shifts in the mindset of consumers when it comes to their destination choices and how they consider, plan and book travel. Similarly, destinations have adapted to the new reality with enhancements in enticing and engaging with potential travellers. Shifts in consumer bucket lists/consideration sets, the core destination value proposition assets, products, services, infrastructure, COVID-19 response, and regulations. The strategies employed by destinations have changed the landscape of travel and understanding these dynamics for each competitor is important to South Africa's strategy development and the building of competitive advantage.

5. SCOPE OF WORK

SA Tourism requires a comprehensive response to global distribution channel trends, market share, and live data indicating what is being sold, the price points, and the rate of recovery comparing present sales to historical levels pre-pandemic. Respondents will need to pull together information from a detailed source of live Global Distribution Systems (GDS) data indicating the coverage of global sales as well as provide an indication of coverage specific to South Africa. This information must be collated into regular monthly, quarterly, and annual updates. In addition to understanding the South African situation, the provider will need to benchmark the South African situation against long haul competitors in overseas markets, benchmark against regional competitors on the continent, and benchmark the domestic travel market against other competing spend categories and priorities, including outbound travel, home improvements, household consumer electronics, etc.

South African Tourism requires live data that is accurate, recent, and based on the current travel behaviours and intentions, such as access to platforms that read into the travel information databases from bookings of air ticket sales, itinerary reservations, hotel, and other accommodation supply. This information is needed for South Africa and the global distribution system in South African Tourism key markets. The provider or providers must have access to live retail, online, and aggregator information. The ideal provider will have access to GDS information and share that access for live analysis and provide periodic reports that synthesise trends and changes weekly, monthly, or quarterly. The greater the frequency and recency of information will be an advantage.

SA Tourism is a global entity with diverse markets at different stages of maturity regarding travel behaviours and trends, travel information availability, different sources of travel information, and levels of depth in the information provided. SA Tourism is looking for an unbiased view of the realities across the markets and within each market. The response needs to provide a flexible mix of approaches to create one version of the truth despite the diversity of African, American, European, Asian, Australasian, and Middle Eastern dynamics.

Information required, for South Africa and Competitor destinations:

- Direct-consumer sales of flight purchase dynamics sourced from airlines, GDS enquiries and sales, online behaviour and purchases (Flight search volume, Top routes searched, Origin of flight searches, flight search net-o-graphics, and demographics)
- Direct-consumer sales of accommodation purchase dynamics sourced from accommodation establishments, GDS enquiries and sales, online behaviour and purchases (Accommodation

search volume, Top regions, cities, itineraries searched, Origin of accommodation searches, accommodation search net-o-graphics, and demographics)

- Direct-consumer sales of attractions and activities purchase, GDS enquiries and sales, online behaviour and purchases (search volume, top regions, cities, itineraries searched, Origin of searches, search net-o-graphics and demographics)
- Profiling on consumers into segments and special interest groups, including but not limited to green travel, sustainable travel, conservation travel, educational tours, family travel, kid-centred travel, LGBTQA travel, niche travel groups (adventure, sport, wedding, honeymoon, nature and wildlife, health and wellness, birding, etc.)
- Profiling on business travellers and buying process, sources of information, search dynamics (similarities and differences contrasted against the leisure traveller). Segmenting the business traveller by delegates to MICE: meetings, incentive trips, conferences, and exhibitions compared to custom business trips.

6. DELIVERABLES:

The list of deliverables below are all required; however, the respondent companies will have freedom as to the format of deliverables not limited to but must include:

6.1. Competitor destination analysis presentations

- a. Build a clear map of the Tourism Value Chain within each market and per segment. The segments are Leisure, MICE, Niche travel, etc.
- b. Identify all indirect, non-traditional intermediaries and support services within the travel landscape.
- c. To determine the COVID-19 regulations status of all destinations that compete with South Africa - both direct competitors and indirect competitors - specifically within the tourism sector and establishments, transportation, and other subsectors or verticals
- d. The specific technological innovations developed to help track and monitor COVID-19.
- e. To understand the destination value proposition of competitors - assets, products, services, infrastructure, COVID 19 response and regulations, tourism and infrastructure investments, and plans over the next 5-to-10-year horizon.
- f. To understand the destinations MICE value proposition how MICE events are being positioned in the Post COVID landscape, including dynamics around hybrid events, in-person, and virtual-only engagements.
- g. To understand budgeting and resourcing.
- h. Pricing dynamics within the destination and the pricing of each element in the tourism value chain i.e. transport, accommodation, activities, services, etc.
- i. Understand the packaging approaches and strategy, i.e. what is included and bundled together in their packages, what elements are left out of their packages and what elements are provided outside of the package as optional extras
- j. Understand the destination's advertising channel mix, the brand content, and creative campaigns
- k. Deep dive into where they play in terms of target regions, markets, and segments
 - i. Which markets are their focus and heavily invested and marketed
 - ii. Which markets are they not invested in at all.
 - iii. Which markets are they increasing investment and planning future growth
- l. Their approaches to marketing intelligence, planning, and decision making

6.2. Competitor strategy (created for and in consultation with SA Tourism)

- a. Identify existing and emerging target consumer segments and their path to purchase along with strategies to drive preference and conversion of travel to SA
- b. Identify existing and emerging trends in selling tourism among competitors to create parity and eventually competitive advantage for SA
- c. Have travel consideration sets changed and how to have that impacted destination South Africa and levers to entice them to SA
- d. To understand each competitor's specific strategies and the changes to these strategies brought on or planned due to COVID 19
- e. To understand the tourism destination, i.e., DMO, Country, or Regional best practice business and marketing strategies.

6.3. Global distribution channel analysis presentations.

- a. Event organisers behaviours and preferences on how they interact with and decide on a destination for MICE (Meetings, Incentive, Conventions, and Exhibitions)
- b. Company approaches to MICE travel
- c. Delegate behaviours with regards to their booking and preferences, the addition of pre-and post- tours, and other leisure add ones
- d. Consumer behaviours and preferences on how they interact with and purchase travel
 - i. Where do consumers search and, how do they evaluate destinations, what information do they seek
 - ii. Where are they buying, booking travel.
 - iii. How does the path of purchase differ between first time travellers to a destination vs. repeat visitors i.e., are they loyal to the destination and the channel, do they change their channel behaviours on repeat travel
- e. Identify all direct, indirect, non-traditional intermediaries and support services within the travel landscape
 - i. The trends in terms of channels that are seeing growth vs. channels that are fading or less important compared to the past
- f. Identify existing and emerging trends in selling tourism to create parity and eventually competitive advantage for SA
- g. To understand aviation availability, pricing, and network, including feeder and connecting flights
- h. To understand ground travel options in terms of availability, pricing, and network of buses, rental cars, e-hailing/ride-sharing, taxis/cabs, rail, etc.

6.4. Global distribution channel strategy (created for and in consultation with SA Tourism)

- a. Build a distribution operational framework for the present and future of travel. To be more effective with the way we deal with a trade that focuses on driving the tourist arrivals and spending to South Africa
- b. CRM framework for engaging with global and regional distribution channels
- c. ROI and measurement framework for ensuring the outcomes we seek through our distribution channel work led to the organisational success
- d. Develop a prioritised strategy for implementation in the broader distribution channel - along with incentive structures to ensure the right actions and outcomes are rewarded for driving growth

- e. Identify existing and emerging target consumer segments and their path to purchase along with strategies to enhance South Africa's presence to drive preference and conversion of travel to SA
- f. Drivers of destination share of sales, shelf space, promotion, and spotlight on platforms
 - i. What makes destination attractive to the channel and how can destinations be more appealing to a broad set of channels
 - ii. What incentives are most effective to get channel support?

6.5. Additional ad-hoc reports may be required to answer specific questions and provide specific insights.

7. FORMAT OF DELIVERABLES

The deliverables need to include but not be limited to Synthesized Insight Presentations in PowerPoint, Presentations in live dashboards periodically updated, and where applicable data in raw data file formats that allow further analysis such as SPSS, SQL, Excel, etc.

- Raw data that enables analysis at a consolidated or granular level
- Detailed dynamic dashboards which allow for viewing insights and data by region, market/country, and comparison of trends over years
- Executive summary presentation with insight and clear recommendations for South African Tourism in PowerPoint
- Other innovative formats.

This information is required from consumer and business travel, including MICE. We need to understand the travel audiences in:

	Countries	
Priority Markets:	<ol style="list-style-type: none"> 1. Australia 2. Botswana 3. Brazil 4. Canada 5. China 6. eSwatini 7. France 8. Germany 9. India 10. Italy 11. Japan 12. Kenya 13. Lesotho 14. Malawi 15. Mozambique 16. Namibia 17. Netherlands 18. Nigeria 19. Russia 20. South Africa (Domestic) 21. Spain 22. UK 23. USA 24. Zambia 25. Zimbabwe 	

8. PRICING SCHEDULE

This information is required over a thirty-six (36) month contract from a reputable company or group of companies with global reach and perspective yet offer deep local understanding and insight. The terms of data usage and ownership of intellectual property must be included in all proposals and factored into the proposed pricing schedule. South African Tourism may seek to negotiate for the right to own, reuse, publish data on its private and public platforms.

A detailed pricing schedule should be included in the bid proposal indicating the overall contract value and the annual split of costs for all deliverables, detailing all aspects to deliver the requirements to South African Tourism as required under this tender. For the avoidance of doubt, the detailed pricing schedule should also be summarised under Part A (ANNEXURE C) of the bid document. For the purpose of evaluation, the price shall include all local taxes and other reimbursable expenses.

END.