**Terms of Reference**

**For**

**Hiring a Consultant for Visitor Surveys, Data Analysis, Market Research, Report Development and Designing of the Annual Report-Bhutan Tourism Monitor 2015**

1. **Background**

One of the main responsibilities of the Tourism Council of Bhutan as the apex tourism regulatory body in the country is to ensure that the industry grows in a sustainable manner. This vision is realized through the implementation of the national tourism policies and various regulations that uphold the overall vision. Policy decisions have to be based on research and factual findings as opposed to anecdotal evidences that may not give the full picture. In this light, the annual tourism report – The Bhutan Tourism Monitor was introduced in 2004 as a publication of the Research unit of the Plans and Programs Division, TCB. Its, main objectives is to provide quality information, factual findings and forecasts to meet the needs of a wide range of tourism sector users. The rationale ensures the tourism industry has the information it needs to support policy, marketing and commercial decisions relating to the sector.

Today, the report has grown to be one of the most comprehensive reports in the country that presents the overall tourism performance of a particular year. The document is widely referred by policy makers and private tourism entities for various policy interventions, planning and marketing of the tourism industry as it presents a detailed statistical breakdown of tourism arrivals, first-hand comprehensive feedback from tourist and market intelligence. Data for statistical analysis is retrieved from Tashel Database maintained with the Tourism Council of Bhutan; first-hand feedback is collected through various exit surveys conducted at the airport; and market intelligence is researched through various analysis based on inbound and outbound trends in Bhutan’s major markets. In the recent years the report also presented an individual’s look at the major source markets by analyzing their travel patterns and preferences. It has been hugely successful in its objectives of creating awareness and informing the nation as the Tourism Council of Bhutan has been distributing the report gratis to key organizations in the Government as well as the Private sector.

The Tourism Council of Bhutan Secretariat would now like to outsource the Visitor/Exit surveys and the development of the annual report, including printing to a competent consultant who will be in a position to further improve the quality of the report by lending his/her external views and expertise.

1. **The project can be broadly segregated into THREE major components;**
2. Visitors Surveys and Data Analysis
3. Development of the Bhutan Tourism Monitor (BTM) Report
4. Design and Printing of the BTM Report

**PART 1: Visitors/Exit Surveys and Data Analysis;**

The project would require the consultant to carry out various visitors surveys at the Paro International airport and star hotels in Thimphu, Phuntsholing and other relevant Dzongkhags, with collection periods spreading equally over the year 2015.

* 1. **Objectives of the Visitors Surveys;**

**Obtain information and feedback from the departing tourists on:**

* Country of origin, background, education levels, age bracket for Visitors Profiling and

segmentations

- Travel party, Intentions for repeat visitations, purpose of visit, Circuit combination of the trip with other markets in the region, Primary source of information on Bhutan, Major Draw Cards, Spending patterns, Time of Visitations etc for determining the Visitors Preferences, Expectations and Motivations.

-Value for money levels, feedback on quality of Hotels, Guides, Tour Operators, Aviation services etc for First hand Feedback and Satisfaction levels.

-Suggestions, improvements, complaints and other qualitative and observational opinions for priority attention to improvement of services.

**1.2 Methodology**

The Tourism Council of Bhutan is also focusing on the high-end regional visitors, and it is mandatory to include this segment in sampling. Two separate questionnaires for ‘International’ and ‘Regional’ visitors will be developed owing to the different tariff/visa regulations for these two categories of visitors (different tariff structures resulting in different levels of expectations and preferences). These two separate surveys will need to be analyzed separately at the end of the year and findings will need to be reflected in separate chapters in the BTM report.

The Visitors/Exit Surveys will be undertaken using the on-site methodology by commissioning a team of highly skilled and professional enumerators to the Paro International airport and the hotels in Thimphu and Phuntsholing. Surveys need to be conducted through one-to-one interviews with the visitors at the Departure Lounge while waiting for the boarding formalities and with regional visitors at the star hotels in Thimphu and Phuentsholing. This would require the consultant/company to employ 5 to 6 enumerators who possesses good conduct, etiquette and professionalism, as they will be representing the Tourism Council Bhutan.

* 1. **Sample Size**

The target sample size for the year 2015 is 12 % to 15 % of the expected tourist arrivals comprising of both international and regional high-end visitors.

* 1. **Data Collection Periods**

The data collection periods should be spread over the year. Earlier experiences have shown that at least SIX collection periods with FIVE enumerators are required to achieve the sample size of 12 – 15 % of the forecasted annual arrivals. It is recommended that the data collection periods be carried on alternative months with each lasting a month. This will ensure that data on preferences of specific time of visitation is captured. Surveys will have to be conducted through one-to-one interviews by trained enumerators to ensure that accurate feedback is recorded.

* 1. **Advantages of the on-site ‘One-To-One Interviews’.**
* Administered Exit Surveys are much more personal than the un-administered surveys and provide a setting where the agency can thank departing visitors for their contributions and wish them well in their future endeavors.
* The response rate for Exit Surveys is typically much higher than un-administered online/post-back surveys. Departing visitors will usually be willing to participate in one-to-one interviews over and above other methodologies that are normally adopted.

Exit Surveys provide a richer data than un-administered/online surveys. An experienced enumerator can ask probing questions and perhaps uncover underlying reasons for some particular opinions that may not otherwise surface.

**1.6 Guidelines to elicit candid feedback**

Exit Surveys data is useful as a management tool only if the responses provided by departing visitors accurately and truthfully reflect the real opinion about their experience in Bhutan. Visitors are likely to give candid feedback when:

* The enumerator approaches the visitor and explains how their participation in the surveys could contribute towards better decisions-making in tourism policy to make Bhutan a better place to visit.
* They are provided with assurances that their feedback will be only for official purposes and that their identities, and the identities of their guides, hotels and tour agents will be kept confidential.
* They are offer specific assurances that they will be protected from future spam through email.
* Enumerators should be skillful, decent and good listeners. The enumerators should use a standard format for interview, but be flexible enough to ask questions. They should set a positive and relaxed tone for the meeting and use active listening skills. When dealing with negative or critical visitors, it is important to avoid the temptation to defend an agency or justify its actions.
  1. **Data Analysis**

On completion of every data collection period, the filled up questionnaires for each respondent will have to be inputted into two separate ***SPSS (Software package for Social Sciences) database***, for international and regional visitors respectively. The two databases will have to be analyzed separately owing to the different feedback received from these two segments of visitors. At the end of the year 2015, this essentially corresponds to data punching of 12 – 15 % of the respondents sampled for the entire year.

It is required for the consultant to possess sound statistical knowledge and analytical skills in using ***SPSS Software***. Consultant/company is expected to have a personal copy of the software package. Furthermore, the duly filled-in questionnaires will need close perusal relating to the qualitative questions that relate to suggestions for improvement. Complaints and suggestions will have to be categorized and converted into quantitative representation based on the number of incidences for each complaint or suggestions. Complaints relate to specific entities (for example a tour operator, hotel, guides etc) should be reported in a separate report to the Director, Tourism Council of Bhutan.

**PART 2: Development of Bhutan Tourism Monitor Report**

**The report – The Bhutan Tourism Monitor 2015 – will have to be presented in 5 parts.**

**2.1 Preface**

This includes the forward by the Director of the Tourism Council of Bhutan, a brief write-up on the report, the methodologies used, executive summary, key achievements of 2015 and write-up on the overall performances of global tourism in 2015 making specific references to arrivals in the region.

**2.1 Tashel Data – Actual annual tourism figure**

Part 2 will present the actual statistical figures pertaining to the year 2015. The current figures are compared with figures from the last few years to demonstrate clear trends in the tourism industry. This information is found to be hugely important while discussing tourism strategies and policies at the national level. The actual figures are also used as reliable sources of information by visitors considering investments in the industry. Data input to this section is extracted from the ***Tashel Online*** database using custom ***MySQL*** queries. It is manifest for the consultant to have sound technical competency with database administration using ***MySQL*** querying language, in order not to disrupt or damage the live database of the ***Tashel System.*** Additionally, the consultant should also be adept in tourism technicalities to calculate occupancy rates, average length of stay, tourism intensity index etc.

Figures pertaining to overall regional arrivals will need to be collected from the Department of Immigration; the agency authorized for the each of the top 10 markets shall include the following information’s:

* Growth or decline rates in the last few years
* Profile of visitors from that source country
* Preferred length of stay for each market
* Preference on travel party
* Preference with circuit tourism
* Preferred entry and exit points
* Their total outbound figures in South Asia
* Holiday timing as compared to the preferred time of visit
  1. Timeframe

The BTM report is expected to be finalized (at least in soft copy) by end of April, 2016.

**PART 3: Designing**

Once the report has been finalized and approved by the Tourism Council of Bhutan, the report will have to be designed using ***Adobe InDesign*** and ***Photoshop***.

**C. Expected Outcomes from the Project**

1. Bhutan Tourism Monitor 2015-Annual Report (soft copy)
2. ***SPSS database*** and output containing questionnaire entries with detailed analysis and graphs
3. Breakdown of the each of the parts in the report with working files
4. Compilation of various reports and working files generated from Tashel Database
5. Qualitative feedback from exit surveys to be presented in a summary
6. Report consisting of complaints by visitors that are specific to a tour operator, hotel and guide

**D Selection Criteria**

**The consultant will be selected based on the following criteria.**

1. The consultant should have a minimum of 5 years of proven experience in tourism or related research, statistical analysis using ***SPSS*** and official report writing. Proficiency in ***SPSS*** is a must.
2. Consultants should have a copy of working ***SPSS software*** on their workstation.
3. The work involved database querying and graphics designing. Therefore consultant should have added expertise in database administration using ***MySQL*** and graphic designing using ***Adobe InDesign*** and ***Photoshop***.
4. Should have at least authored five credible research reports in his/her work portfolio.
5. Preference will be given to those who have certification with tourism or related planning, research and database administration.

**E Required Documents and Terms and Conditions**

1. A detailed proposal indicating strategy, methodology, required timeframe for Visitors Surveys and Development of the BTM-2015.
2. Consultancy fees for the entire Visitors Surveys (At least 6 data collection periods including Data-punching and analysis using ***SPSS***). *Please note that all surveys stationeries including paper questionnaires will have to be provided by the consultant/company.*
3. Consultancy fees for research, development and report writing of BTM-2015 annual report.
4. Cost of designing the report.
5. Official reports authored. Reference letters from heads of organization should be attached if the consultant’s name is not specified as the author.
6. Certificates of university degree and additional courses undertaken in tourism/research.
7. Valid trade license for consultancy. Submission of application using other’s license will not be entertained.
8. Curriculum-vitae

**7. Submission**

The deadline for the submission of the detailed proposal is 18th February 2015, 2 pm sharp. Proposals should be addressed to the Director, Tourism Council of Bhutan.

Issuance of travel permits for regional (mainly India, Maldives and Bangladesh) visitors. Tourism earnings from Drukair will need to be collected from Drukair Corporations. Tourism earnings from service taxes to be solicited from the Department of Revenue and Customs.

**This section should provide detailed analysis on the following topics;**

1. Current Trends – Number of international and regional tourist arrivals, number of bed nights, visitors by activity, number of tour operator, tourism earnings, Hotels and guides etc.
2. Profiling and Segmentation – Major source markets by origin, global segmentation of markets, visitors by type of activity, by tour operators and type of hotels etc.
3. Preferences and Motivation – Average length of stay, mode of transport, entry and exit points, geographical spread of visitors, tour group size, visitors preferences to various festivals and treks, seasonality of visitation etc.

**2.2 Findings of Visitor/Exit Surveys**

Part 3 of the report will present the findings of the Visitors Surveys collected throughout 2015. The data will elicit a more in-depth ‘snapshot’ of the visitor’s travel behavior, motivations, patterns and preferences and suggestions for improvement.

**This part will include the following topics;**

* Age of Visitors by Nationality
* Level of Visitors education
* Travel Party Composition
* Repeat Visitation
* Intentions for repeat Visitations
* Average length of stay
* Sources of information on Bhutan
* Awareness on general tariff structures with specific references to various discounts
* Circuit tourism referring to countries in the region that was combined while visiting Bhutan
* Major attractions visited
* Major draw cards to Bhutan
* Preferred time of visitation
* Suggestions of keywords describing Bhutan
* Opinions on value-of-money
* Satisfactions levels with tour guides, hotels, restaurants etc
* Out-of pocket spending
* Prevalence of undercutting
* Suggestions for improvement

**2.3 Exit Surveys for Regional Visitors**

Like the international visitors, this year’s report will also include a detailed analysis on the regional high-end visitors.

**These sections will include the following topics;**

* Basic profiling including gender, age category, level of education and nationality
* Main purpose of visit
* Travel-party composition
* Repeat visitation
* Intentions of repeat visitations
* Average length of stay
* Source of information on Bhutan
* Circuit tourism referring to countries in the region that was combined while visiting Bhutan
* Major attractions visited
* Type of trip
* Countries shortlisted as possible holiday destination before choosing Bhutan
* Satisfaction levels on hotels and restaurants
* Mode of local transport
* Entry and Exit sector
* Keywords describing Bhutan
* Value-for-money opinions on Bhutan
* Out-of-pocket spending
* Suggestions for improvement

**2.4 Detailed trends on top 10 Source Markets**

Part 5 shall preset an in-depth analysis of the top 10 markets of 2015, by providing overall characteristics and the performance trends of a particular source market. Findings of this section help local tour operators and other service providers to understand a specific source market in order to develop the right marketing messages. This part involves studying a particular market in detail, including inbound trends and preferences on Bhutan, combined with a thorough research of the outbound behavioral patterns. This section requires the consultant to solicit information on each of the top 10 source markets from their respective statistical offices and also international tourism organizations like UNWTO, PATA, World Travel and Tourism Council etc. It may also be required for the consultant to procure some of the country specific yearly tourism reports from UNWTO. Outbound trends for each market should be compared with the inbound trends to Bhutan and the neighboring countries. This section of the report should provide ample information pertaining to a specific market to be able to make reliable forecasts.