

TERMS OF REFERENCE

- A. PROJECT: MARKET RESEARCH FOR PHILIPPINE ESL NICHE MARKET**
B. BACKGROUND :

A market research enables users to gather specific data about the English language travel source markets. Data such as long-term demand volume for English study, preferred channels of information, spending capacity, brand awareness, and country competitiveness can be harvested through an in-depth market research which can be used to craft sustainable and high impact programs and plans that will lead to making the Philippines a preferred English learning destination in Asia.

The ESL market research, will aide in completing the following:

- Target setting for Market Development Group-ESL from 2019-2023;
- Development of Philippine ESL Tourism Roadmap;
- Development of 2019 Communication and Marketing Plan in identified markets;
- Presentation and updating of market information for private sector stakeholders; and
- Development of product enhancement programs for ESL stakeholders

C. MINIMUM REQUIREMENTS FOR SUPPLIERS:

1. A company capable of conducting market research for English Language Travel Market
2. With extensive work experience (minimum of 5 years) in market research in tourism and travel industry
3. Must be affiliated or recognized by international tourism association/organization (example: UNWTO)
4. Presence of international offices or sub-offices is an advantage.
5. Company must be able to submit a research proposal containing description of research methodology/ tools.

D. SCOPE OF WORK:

A qualitative and quantitative report will be based on the collection and analysis of primary and secondary data. Possible sources of secondary data include the following –

- British Council market introductions (where available)
- American Council on the Teaching of Foreign Languages (TESOL information)
- Hothouse Media/Study Travel Magazine
- The PIE (<http://www.thepienews.com/>) articles and reports
- Other internet research

Qualitative research should include interviews with English learners from South Korea, China, Japan, Taiwan, Russia and Turkey as well as market 'experts' and international institutions that are recognized authority and certifying bodies of English Language Teaching such as ,but not limited to, the British Council, study abroad agents, and other industry stakeholders.

We also welcome any suggested development of the methodology proposed above, backed up with the rationale for doing so and the pros and cons of alternative approaches.

The required market research for English language travel must include the following data:

1. Total outbound travel for English Language Travel segmented by country, age, and spending capacity from 2013-2017 including student mobility forecast until 2022;
2. Country profiles of key English Language Travel destinations including: UK, USA, Canada, Australia, Malta, New Zealand including data on:
 - a. Country arrivals travelling for English Language from 2013-2017 including growth rate

- b. ESL programs and products with course prices available
 - c. Marketing campaigns for student/language travel and promotional activities undertaken
 - d. English School accreditation, visa and student programs and policies implemented from 2015-2017
3. ESL Student traveler data from South Korea, Japan, China, Taiwan, Thailand, Russia, and Turkey to include the following:
 - a. Demographics (Age, Gender, Income capacity, Education, Occupation, Purchasing ability)
 - b. Travel behavior (Sources of Information, Length of Stay, Period of Stay, Accommodation requirement, Notable travel patterns)
 - c. Motivations and Preferences (motivation for learning a second language, expectation in language school and destination, preferences on school facilities and ESL courses)
 - d. Methods and Channels students use to enquire, plan and select English language courses abroad
 - e. Baseline data for ESL travel to the Philippines from 2012- 2017
 4. Product survey for Philippine ESL (expectations, satisfaction for programs and programs/ services availed, etc)
 5. Competitor analysis for the Philippine ESL in Asia (comparison of Philippines and competitor product offerings and 'unique selling propositions', prices, distribution channels and ESL program components as well as marketing campaigns and tools used)
 6. Recommended Action Plan for Philippine ESL (proposal of plans and programs for school/institution and teacher development, cost-effective marketing mix strategy, product development programs, communication plan, designs for promotional materials, etc)

E. EXPECTED OUTPUT

The market research should be delivered in printed and digital format (preferably in PDF format) with a minimum of 30 pages with data visualizations (e.g charts, tables and infographics) and complete data interpretations and insights.

All data gathered such as country specific information (such as but not limited to arrivals, market campaigns) and survey results should be submitted as appendices. A presentation of initial draft of the study should be conducted prior to the submission of the final report.

F. PROJECT DURATION AND BUDGET

Final market research should be completed within **four (4) months** upon receipt of the Notice to Proceed.

Total budget for the conduct of the market research is **PHP 3,000,000** equivalent to **US\$ 60,000** (USD 1= PHP 50), inclusive of taxes. Prices of individual parts are as follows:

Secondary Market Data	PHP	1,100,000
Primary Data Research	PHP	1,260,000
Competition analysis and Recommendation	PHP	640,000

The winning bidder shall be determined based on the proposal's responsiveness to the TOR and with most advantageous financial package, provided that the amount of bid does not exceed the above total budget.

G. CONTACT DETAILS

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