



Part B: - SCOPE OF WORK (SAT TENDER NUMBER NORTH AMERICA 001/22 INTEGRATED MARKETING AND COMMUNICATION AGENCY)

Bid Description	
North America Integrated Marketing, and Communication Agency	
Bidder Name:	
CSD MAA number	MAAA
Tender Number:	SAT Tender number North America 001/22
Closing Time:	12h00 (USA EST time)
Closing Date:	29 August 2022 (No late submission will be accepted)
Compulsory Briefing Session:	No Compulsory Briefing
Contact Person	Pulane Muligwa
Bid Submission Link	https://forms.gle/mxBVFWtUWwoCAkqc9 Should bidders encounter any issues, 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.
Section	Supply Chain Management
Contact Person	Pulane Muligwa
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

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1. INTRODUCTION

South African Tourism Board (South African Tourism) was established by section 2 of the Tourism Act No 72 of 1993 and continues to exist in terms of section 9 of the new Tourism Act No 3 of 2014. South African Tourism is a schedule 3 A Public Entity in terms of schedule 3 of the Public Finance Management Act 1 of 1999.

The mandate of South African Tourism in terms of the Tourism Act is to provide for the development and promotion of sustainable tourism for the benefit of the Republic, its residents, and its visitors. It is common cause that tourism is a key strategic industry in terms of National Tourism Sector Strategy documents as it supports government objectives of alleviating the triple challenges of unemployment, poverty, and inequality.

The scope of South African Tourism's business includes four distinct areas of business focus and delivery, with different target markets and segments:

- I. International Leisure tourism (travel trade and consumer); and Domestic leisure tourism (travel trade and consumer)
- II. Business events through the delivery unit of the South African National Convention Bureau (Meetings, Incentives, Conferences, Exhibitions);
- III. Quality assurance of tourism establishments through the delivery unit of the Tourism Grading Council of South Africa.
- IV. Corporate - enhancing the South African Tourism brand

Section 217 of the Constitution of the Republic of South Africa, 1996, prescribes that goods and services must be contracted through a system that is fair, equitable, transparent, competitive, and cost-effective and also confers a constitutional right on every potential supplier to offer goods and services to the public sector when needed.

The submission of proposals will be in terms of this document. All information requested, must be supplied and all annexures completed, whether such information or annexure refers to the eventual tender or not. This information will form part of the eventual tender and must therefore be completed, as there will not be an opportunity to do so later. Thus it is essential that the information supplied is both correct and true.

South African Tourism has a detailed evaluation methodology premised on Treasury Regulation 16A.3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act, No. 1 of 1999), the Preferential Procurement Policy Framework Act 2000 (Act, No.5 of 2000) read with Preferential

Procurement Regulations 2017, and the Broad-Based Black Economic Empowerment Act, 2003 (Act, No. 53 of 2003).

Prospective tenderers must periodically review <https://www.southafrica.net/gl/en/corporate/page/tenders> for updated information or amendments with regard to this tender, prior to due dates.

2 CLOSING DATE

The closing date for the submission of proposals is **29 August 2022 at 12:00 pm** (USA EST time). No late submissions will be accepted.

3 TENDER SUBMISSION LINK

3.1 Bidders must submit their proposal using the below link.

<https://forms.gle/mxBVFWtUWwoCAkqc9>

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.

3.2 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.

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

3.4 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

4. CONTACT AND COMMUNICATION

4.1 A nominated official of the bidder(s) can make enquiries in writing, to the specified person, Pulane Muligwa via email tenders@southafrica.net. Bidder(s) must reduce all telephonic enquiries to writing and sent to the above email address.

4.2 Bidders are to communicate any technical inquiries through the nominated official in writing, no later than **12 August 2022**.

All responses will be published by **19 August 2022** on the following links:

<https://www.southafrica.net/gl/en/corporate/page/tenders;>

5. 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.

6. 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.

7. DETAILED SCOPE OF WORK

7.1 Business case

The North America hub requires an integrated communications agency that can deliver on the following:

- Strategy: Developing a communications strategy that covers audience, channel, performance against objectives, optimization, etc.
- Creative: The creative execution should consider that there is a global asset base that can either be utilized as is, localized for the North American market and that some assets need to be created from scratch. Creative ability must include the implementation and localization of global toolkits.
- Technical ability
- Dissemination/Delivery: The agency will be required to utilize the South African Tourism global platform tools.
- Public Relations and Communications: Trade and consumer PR requirements
- Measurement and Reporting: Agency needs to show proficiency with analytics required for managing digital and off-line media and publishers. Ad servicing management will be done on the South African Tourism global account.

The agency will have to clearly illustrate how they have utilized data and analytics to drive choices and performance.

Furthermore, the agency brief and measurements will be developed in conjunction with the relevant Brand & Marketing teams to ensure that (a) we have a seamless fit with the SA Tourism HO agencies and infrastructure, and (b) that all developments in-country is centrally 'owned', recorded and measured in the head office repositories

A. OPERATING ENVIRONMENT & AGENCY CRITERIA

The greatest challenge we face is "Growth & Recovery" in a post Covid 19 World. The evidence we have is that demand for Global long-haul travel will take 24 to 36 months to fully recover from our key source markets. Among the most significant reasons preventing Global travellers from traveling are fears about health and safety, as well as lack of money and time due to the crisis. Traditional trade consumer segments have shifted with consumers demanding booking flexibility with trade or direct bookings with product or airlines. A return to booking through travel agents is predicted following losses that consumers who booked their travel online had faced when needing to cancel due to the pandemic.

Due to the requirement to localise marketing communications for the North American audience, the services required are for two key North America markets, namely; the United States of America and Canada.

The agency must respond to the following criteria, including but not limited to:

- Be located in the USA, preferably in the New York City region.
- Be present in one other market: Canada. Either directly or through an agency's alliance and network.
- Be skilled in marketing and communications strategy; both consumer and trade: marketing, multi-disciplinary concept/creative development; public relations and communications.
- Proficient in excellent creative and digital output..
- Have a single contact for the two markets

B. TARGET AUDIENCE

We target travellers, not tourists and travel is a state of mind for them. They are global citizens for whom travel is an essential part of their everyday lives. They want to engage our destination and seek out interesting and high-quality experiences. They are Adventurous and open to new experiences; these people seek to escape the mundane of everyday routine. At a deeper level, they strive for opportunities to enrich their lives, ultimately, they are explorers at heart.

The Target audience are both Consumers (B to C) and Trade (B to B). Consumer profile/target: Repeaters and First-timers, from Millennials (25-35 years old) to pensioners (over 60). Every kind of groups are taken into consideration: family, friends, lone travellers, couples.

Opportunities - Older travellers (Next Stop South Africa; NSSAs) are endowed with time and money with the ability to influence increased spend and geo-spread as they are mostly fully vaccinated. Younger, more adventurous travellers (Wander lusters; WLs) represent a remote working/ leisure opportunity given the 90 day VISA free entry requirement; LGBTQ+ and Black travellers also offer huge growth potential.

C. MICE AND CORPORATE

In North America, we focus on building our brand to appeal to the incentive market. However, we are always on looking for opportunities for our National Convention Bureau to pitch for conferences or events in South Africa that will boost our arrivals and spend in South Africa.

7.2 STRATEGY

SA Tourism North America is looking for an integrated marketing and communications agency to deliver a marketing strategy with strong execution elements across all platforms and environments to amplify South African Tourism's message, enhance the brand and drive sales and conversion. The strategy will have to include how we inspire North American consumers with authentic, stand-out stories and tailor-made content that convinces them to seek information on SA and gets them to choose South Africa over competitor destinations by providing information that reduces perceived barriers which include: pricing, safety and security. For our repeaters (consumers who have visited SA in the past) our strategy is to provide compelling offerings of immersive hidden gems, and traveller-conscious experiences that expose them to something new & different and to meet our people across South African provinces to drive inclusive growth.

The agency must be able to lead travel trade comms and collaborate with trade partners, such as airlines and tour operators, to maximise synergies, enhance traveller experience and close sales. Key verticals within the travel trade value chain include - consumers (and customers), travel suppliers, travel intermediaries, inbound operators and product/service providers.

Consumers - Consumers include tourists who visit the destination. Customers are those entities that make bookings on behalf of the tourists (consumers), such as corporate travel desk. Consumers are categorised as leisure and MICE tourists

Travel suppliers - Travel suppliers refer to the retailers who sell the packages of the wholesalers in the market. It also includes independent agents who sell airline or hotel booking services. These include brick-and-mortar travel agents and online travel agents (OTAs)

Travel Intermediaries - Travel intermediaries refer to the wholesalers who both sell and design the packages for the consumers. They typically sell their packages through a vast distribution channel that consists of retailers. They primarily include the tour operators

7.3 CREATIVE:

- Localisation of global toolkits.
- Origination of content (long form and short form)
- Application of all brand elements
- Production capability including an innovative way of production in a digital age
- Include a list of creative requirements the per the RFP task.

7.4. DISSEMINATION & DELIVERY

Dissemination and delivery of all content across platforms.

- Currently those tools consist of paid search, social media advertising, and programmatic. SA Tourism will add additional tools as required. Where SA Tourism does not have the relevant platform tools, the agency must have the capacity to purchase their own.
- This may include (but is not limited to), Industry benchmarked social listening tools.

7.5 BRAND PR

- Fully integrated PR marketing development, planning, execution and monitoring (incl. optimisation and reporting) of the annual marketing plan which includes i.e. digital, offline and social media PR expertise. Check and advise on the legislative framework for the

relevant campaign or when related to SAT directly (e.g. GDPR: advise SAT on legal documents relevant for the market in the specific language).

- Create, implement and track campaign messaging for the hub and tweak where applicable for the various markets (based on market insights). Ensure consistent messaging for integrated consumer and trade campaigns across the relevant channel mix.
- Proactive idea generation to enrich the overall regional marketing plan with breakthrough projects/campaigns to address the SAT defined targets. Identify and activate non-travel and travel-related brands to boost confidence in destination South Africa and extend reach and share of voice in the region.
- Implement a smart and clear ROI model throughout all activities.
- Amplify agreed integrated marketing and PR plan and campaign(s), identify and propose platforms and/or ideas to maximise consumer campaign leveraging and partnerships in market.
- Create and implement an integrated PR strategy for traditional, social and digital in line with annual marketing plan.
- Handle management of projects incl. communication and consultancy, workflow-management, weekly updates and project management reporting as per SAT requirements.
- Increase PR coverage on the destination South Africa annually according to set targets. Media monitoring and reporting.
- Evaluate and amplify fiscal media buy by negotiating advertorial and editorial where applicable.
- Create and manage a top SA consumer and trade media database as per GDPR framework.
- Consumer and Trade Media: Identify, execute and monitor media activation such as media networking events, round tables, etc. - as per agreed integrated marketing & PR plan or on an ad hoc project with a specific purpose and deliverable(s).
- Media Hosting: Negotiate deals with the press for press trips, incl. Indaba media hosting and handling the press trips following SAT procedures
- Assist activation needs at global platforms in market e.g. sourcing photographers, videographers, facilitators etc. to activate in the region as per global SAT needs and as briefed.

7.6 TRADE FACING PR

- Amplify the marketing and PR campaign in the hub through i.e. relevant trade extensions and platforms for consumer facing campaigns to integrate conversion elements and negotiate such relevant options with trade in the region. Implement and monitor such trade amplification.
- Handle trade facing campaigns in the region where required by SAT.
- Identify, evaluate, execute and monitor trade campaigns specific in USA and Canada with an experienced resource to represent SAT as an expert in these markets.
- Identify, implement and monitor trade focused events relevant for the integrated marketing and PR plan or as ad hoc project: annual events relevant to SAT to leverage a captive audience with credible “third party” endorsement (B2B / B2B2C). Handle logistics i.e. booking of the venues, and invitation management aligned to SAT procurement.

7.8 REPUTATION MANAGEMENT PR

- Develop, implement and monitor a positive messaging strategy for the region
- Develop, implement and monitor a crisis management strategy and plan
- Support SAT office when needed (during business trips to SA)
- General reputation: approach media and secure interviews for SAT spokespeople during the year, as well as secure possibilities, to submit campaign concepts for awards
- Stakeholder relations: Identify and alert SAT where lobbying or high-level intervention may be required in-market, propose activation suggestions

- Social Media Channels: identify, develop, activate and optimize Social Media Channels relevant for SAT incl. making use of relevant content, monitoring and community management.
- Provide reporting and support with: monthly PR value for the region by channel, updated project minutes, monthly SAT management reports, media activity and contact reports, quarterly and annual reports, development and tracking of relevant competitors and airlift analysis for the region.

7.9 SOCIAL AND DIGITAL PUBLIC RELATIONS

- Conceptualise and run innovative social media campaigns to support offline and enhance the digital activity
- Develop a social media strategy to provide a central interaction platform for all stakeholders
- Manage and work with the digital audience, engage in dialogue and drive positive engagement
- Liaise with influencers/ bloggers to take on familiarisation trips
- Examples of general campaign management services:
 - Campaign creative concept,
 - Activation Production,
 - Activation Execution,
 - Activation Logistics,
 - Budget Management,
 - Activation Report,
 - Public Relations and Communications: trade and consumer

Inbound operators - Inbound operators are trade entities operating in the destination markets, in this case South Africa, who assist the intermediaries with their local expertise in developing tour packages. Key inbound operators include the destination management companies (DMCs)

Product/Service Providers - Product/Service providers include providers of flight services, accommodation, regional transport, local guides, travel insurance, visa and other activities/excursions.

7.10 Trade Representation

- Development, Planning and implementation of trade/channel marketing & sales strategy. → Annual calendar of trade activities.
- Collect and build of an in-market Trade/channel database, as per GDPR framework - Trade database management (update etc.) to be communicated to SAT South Europe hub on a monthly basis.
- Market analysis report (quarterly): Total outbound travel, competitor environment, trade landscape, direct booking channels, consumer purchasing behavior, developing travel trends.
- Accompany South African Tourism in the trade landscape: trade calls, trade exhibitions, trade activations.
- Identify, implement and monitor trade focused events, reporting post-event. Handle logistics i.e. booking of the venues, invitation management aligned to SAT procurement.
- Organization and management of trade fam trips. Use hosting as a tool for content generation (i.e.: trade PR).
- Assistance for the selection and qualification of hosted-buyers to invite them to Trade Shows in South Africa.
- Online/offline trade training strategy and calendar: Trade seminars / workshops, Trade training sessions, Webinar training, SAT online training course participation, Networking sessions & Fam Trips.
- Identification, development and management of trade and unconventional partnerships with strong ROI for SA Tourism.

- Channel & stakeholder (airlines, SA product representatives, trade associations, OTA, travel aggregators) engagements, reporting and contact taken.
- Development, planning and implementation of B2B and B2B2C Campaigns (DDC - Deal Driven Campaigns) to encourage trade to promote the destination and increase sales.
- Development and distribution of content for monthly / quarterly newsletters in coordination with SAT HQ initiatives (i.e. Monthly product newsletter)
- Liaise with all South African Tourism appointed agencies where required.
- Development and distribution of support traditional trade toolkit.
- Development and distribution of digital trade toolkit.
- Trade specific media buy strategy development, planning and implementation.
- Creative and production of trade content and promotional items.
- Storage and distribution management of South African Tourism collateral.
- Submission of monthly, quarterly and annual reports.

7.10 Measurement and Reporting:

- Project communication & consultancy,
- Workflow management,
- Weekly updates to SAT,
- Monthly reporting as per SAT requirements,
- Yearly reports at the end of each fiscal year (March)
- Closing / handover report to be handled in the last 30 days prior to the contract termination. The report must ensure all information gathered during the 3 year activities is being handed over to the client (contact details, data, summary of activities and total ROI generated in PR, trade marketing etc.)

7.11 Regional Operations Capability

The North America Hub Office is based in New York City, USA. The preferred bidder must demonstrate and have the capabilities to operate regionally in the following North America markets:

- USA
- Canada

This includes conceptualization, development and execution of marketing projects in each of the above listed markets. The preferred bidder must be able to physically attend monthly, quarterly and annual meetings at the South African Tourism Regional office in New York. All regional travel costs for meetings must be included in the relevant project fees that will be signed off by quarter by South African Tourism

We expect efficient planning, execution and monitoring according to our annual business plan. The agency will implement a smart and clear ROI model throughout all activities, providing us with project-based reports, weekly updates and general reports on a monthly basis. Finally, an input is expected for the monthly, quarterly and annual SAT reports.

7.12 INTELLIGENCE AND INFORMATION USAGE

South African Tourism understands that we are operating in a constantly changing environment and that attitudes towards travel will not remain static. Our expectation would be that our agency will have the ability to monitor these constant consumer changes through our campaign work and contribute to our insights deck with relevant insights from both trade and consumer behaviors.

7.13 ADDITIONAL DOCUMENTATION

Proposals from bidders should clearly demonstrate their understanding of the brief and should further demonstrate their ability to successfully deliver on all the requirements as outlined under section 7. above.

SAT expects to receive several proposals, in order for our bid committee to effectively evaluate the proposals, prospective bidders are required to include information relevant to the following six topics.

- A. Introduction
 - Agency overview, size, company structure; and
 - Relationship with other subsidiaries of your parent company
- B. Marketing capabilities
 - Describe any prior destination marketing experience;
 - Outline how other experiences outside of destination marketing would allow you to deliver innovative solutions to this sector; and

- Describe any competitive advantages that differentiate you from your competitors
- C. Solution overview
 - Brief description of your understanding of SAT's needs and the challenges it faces in the North America region. In doing so, please do not paraphrase or repeat the content of this RFP; and
 - Describe how you would deliver on each Scope of Services section and any additional value-added services that you could offer based on your understanding of SAT's challenges
- D. Experience, skills and qualifications of the proposed team who will work on the project/account
 - Provide a chart illustrating the specific human resources that will be assigned to the project and their experience on similar projects;
 - Indicate how the quality and availability of staff will be assured over the term of the agreement; and
 - Outline the reporting structure and how each team member would liaise with the client lead and the PR and media buying account leads.
- E. Work plan and project management
 - Propose a work plan with associated timelines that will accomplish the tasks mentioned under scope of services; and
 - Outline plans to monitor the campaign's performance and implement corrective measures where necessary.
- F. Cost
 - Provide two high level cost estimates, including all fees and resource rate cards for:
 - Solution to meet minimum requirements; and
 - Solution with proposed value-added services.
 - Cost should be presented in the same format for year 1, 2 and year 3 (with applicable escalation where relevant) and should separately indicate any once-off cost associated with the project.
 - SAT also requires representation of cost for the additional 2 years should SAT chooses to further extend the 3-year appointment

7.14 AGENCY CREDENTIALS

Proposals should also include credentials in the form of at least 2 examples of exemplary work carried out in the area of consumer and trade campaigns creation and management. All credentials should highlight your concept development, creative capabilities and any instances where you have leveraged other 3rd parties or departments within your wider organisation. They should not be older than two years and should include:

- Client name & background;
- Challenge faced by the client;
- Solution delivered by your agency with supplementary graphics and/or URLs where appropriate; and
- Value added by your agency.

7.15 PRICING SCHEDULE

It is however important to note that South African Tourism will contract based on a project fee model structure only. There will be no retainer.

END