



PART B: - SCOPE OF WORK - SOUTH AFRICAN TOURISM: SAT 339/26: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A SEGMENTATION STUDY FOR A PERIOD OF THIRTY-SIX (36) MONTHS.

Bid Description	
SEGMENTATION STUDY	
Bidder Name:	
CSD MAA number	MAAA
Tender Number:	SAT 339/26
Closing Date and Time:	31 July 2026 at 12:00 PM (SA Time)
Bid Submission Link	<p>https://e-procurement.southafrica.net</p> <p>Should bidders encounter any issues, queries must be directed in writing to tenders@southafrica.net</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	Boitumelo Dibetle
Email Address	tender@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, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC), AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF THE CONTRACT

1 CLOSING DATE

The closing date for submitting proposals is 31 July 2026 at 12:00 PM (SA Time). No late submissions will be accepted.

2 TENDER SUBMISSION PROCESS

2.1 TENDER SUBMISSION LINK

South African Tourism have developed and implemented an online e-procurement Portal, enabling bidders to respond to procurement opportunities as and when they are issued by South African Tourism.

The portal is the official portal for South African Tourism, which ensures an open, transparent, and competitive environment for any person participating in the procurement processes.

The portal enables a bidder to register as a supplier on the system to RSVP to tender briefings and to submit tender responses on the portal.

The Portal's URL (<https://e-procurement.southafrica.net>) is compatible with Google Chrome, Microsoft Edge, Internet Explorer, FireFox, and Safari. Interested bidders should, with immediate effect, consider registering and submitting their bid proposals on the portal, which has specifically been developed and implemented for this purpose.

The supplier user manual can be viewed and downloaded on South African Tourism's website at <https://www.southafrica.net/gl/en/corporate/page/tenders>.

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

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

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.

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 may 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 inquiries in writing to the specified person, Ms. Boitumelo Dibetle, via email at tenders@southafrica.net. Bidder(s) must reduce all telephonic inquiries to writing and send to the above email address.

3.2 Bidders are to communicate any technical inquiries through the nominated official in writing no later than **10 July 2026 at 14:00 (SA Time)**.

All responses will be published by 14 June 2026 on the following links:

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

3.3. VALIDITY PERIOD

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

3.4. DURATION OF THE CONTRACT

South African Tourism intends to enter into a three year contract and service level agreement with the successful bidder.. The contracts will also be subject to a periodic performance evaluation on agreed terms and conditions with each successful bidder unless the parties agree otherwise.

3.5 SCOPE OF SERVICES

3.5.1 The South African Tourism (SAT) is the official destination marketing organisation whose mandate is to create demand and promote the country as the preferred tourist destination. The organisational mission is to drive tourism growth to benefit the economy of South Africa, through focused targeted marketing efforts across key international markets as well as the domestic market. The organisation's mission to drive tourism growth is founded on increasing the return on marketing expenditure through focused activities against key source markets. At the centre of South Africa's competitive advantage is the ability to invest in sound market insights that enable South African Tourism to make informed business and strategic decisions further empowering South African Tourism with tools to maximize the economic potential of tourism for the country and its people.

3.5.2 At the core of South African Tourism operations sits the commitment to make insights-driven decision-making, through sound research and analytics. While South African Tourism has invested heavily in building the knowledge bank of tourism information over the past decade or more, it is critical that South African Tourism improves its efforts in leading and being equipped with strategic and actionable insights that help the business achieve its key business objectives.

3.5.3 Through this tender, South African Tourism is looking to appoint a suitably qualified market research company or companies that will provide research solutions to South African Tourism's business problem in determining the brand health of South Africa as a business events destination. The collected information allows South African Tourism to gain deeper insight that will support the marketing of South Africa.

3.6 BACKGROUND TO THE STUDY

SA Tourism has a critical mandate to drive inclusive economic growth by increasing both the volume of tourists and the value they contribute to the South African economy. Central to this mission is the need for insights-driven decision-making, leveraging high-quality research and analytics. SA Tourism has a strong foundation of data on tourism markets but recognises the need to continuously evolve its approach to gathering and analysing insights.

- This includes embracing new methodologies and leveraging innovative tools to enhance our understanding of the tourism landscape. To maintain South Africa's competitive position as a leading destination, it is vital

that SA Tourism reevaluate the segments in the chosen MPIF (Marketing Prioritisation and Investment Frameworks) markets. This tender invites proposals for a comprehensive segmentation solution, designed to provide actionable insights for focussed marketing activities.

Objective

- South African Tourism (SAT) is commissioning a comprehensive segmentation study across 16 international source markets to better understand and target key consumer segments. The study will help tailor marketing strategies to various demographics, enhance competitive positioning, and improve travel engagement to South Africa.
- Some segmentation studies have been conducted in the past for certain markets; however, these are outdated and require refreshing. The markets listed are South African Tourism's key target areas, driving most arrivals to South Africa.
- We are seeking a supplier capable of providing a robust, modern approach to market segmentation—enhancing traditional methods with the advancements in AI and big data. We would like to achieve reliable, actionable segmentation insights more cost-effectively, leveraging these technologies to optimise targeting and enhance engagement within these markets specified below;

Supplier deliverables:

- **Market Segmentation**
 - Identify key market segments in each market.
 - Results must include demographic, geographic, psychographic, and behavioural segmentation.
 - Define the size and potential longevity of each segment.
 - Provide rationale for chosen segments to support targeting strategies.
 - Deliver key insights for each segment to equip SAT with the information needed to target and engage these markets effectively, positioning South Africa with the right messaging and strategies to drive conversions within each segment.
- **Consumer Profiles**
 - Develop detailed profiles for each segment, including demographics, preferences, motivations, and behaviours.
 - Present consumer profiles creatively to bring them to life for the SAT marketing team and partner agencies to use effectively.
- **Travel Patterns and Competitors**
 - Analyse travel trends: peak times, destinations, and preferred travel modes and if these have changed in recent times.
 - Identify and analyse key competitors approaches to marketing, comparing their performance against South Africa. What are they doing better than us in market and how can South Africa improve?
 - Provide strategic insights into competitors to improve South Africa's market share.

- Purchasing and Payment Behaviours
 - Outline travel purchasing methods (e.g., full distribution channels, online, offline, agents, tour operators, and any new channels where applicable).
 - Include insights on consumer trust in online vs. traditional travel agents for long-haul bookings (and specifically bookings to South Africa).
 - Detail payment preferences and variations by market.

Markets to be covered as part of the quote:

The project will run over a period of three years, covering the following 16 markets: 1. Australia, 2. The Netherlands, 3. Japan, 4. France, 5. Germany, 6. Canada, 7. Nigeria, 8. Spain, 9. Italy, 10. Brazil, 11. Mozambique, 12. Zimbabwe, 13. Namibia, 14. Botswana, and 15. Malawi 16. Domestic market. It is envisaged that five markets will be completed per year over the three-year period.

- **Note:** Not all markets may be researched simultaneously; SAT reserves the right to prioritise specific regions or markets due to budgetary availability.

Project Timeline:

NB: Completion within 8 to 10 months per year.

What should be included in the proposal:

- Data Collection Approach - Outline the data collection approach, detailing how qualitative and quantitative research methods will be utilized, and explain how big data and AI will be leveraged to enhance insights, expedite the data collection process, and reduce costs.
- Data Collection Methods - demonstrating an innovative approach.
- Integration of Big Data / primary data collection / secondary data collection.
- Cost-Effectiveness of the strategy proposed and rational for how to keep the cost down.
- Costing should be given for all 16 markets and SAT will prioritise the order in which the markets will be researched
- The project must run within an 8 to 10 months period. The rational for segments must be based on both volume and value of tourists.
- Identify which are the low hanging fruit to gain arrivals in the short to medium term.
- Overall timing of the project as well as the timeline by market.
- Demonstrate how the outputs of the project will be delivered, either as dashboards or reports. The outputs must be agile for easy consumption.
- Provide details of the full team assigned to the project, including their specific roles, experience with segmentation studies of this nature, and how their expertise equips them to understand the cultural and language nuances of the various markets.

Note:

For reference, previous segmentation studies will be provided to the selected supplier.