

**BOARD OF COUNTY COMMISSIONERS,
WALTON COUNTY, FLORIDA**

REQUEST FOR PROPOSAL

For

MARKETING RESEARCH SERVICES



RFP NO: 020-021

The Walton County Tourist Development, (TDC), a division of Walton County is seeking proposals and submissions from firms for the purpose of providing Marketing Research Services and consulting advice.

RFP closes July 27, 2020 no later than 10:30AM local time and will open immediately thereafter.

LATE SUBMITTALS RECEIVED AFTER THE FOREMENTIONED DEADLINE DATE, EITHER BY MAIL, OR OTHERWISE, WILL NOT BE CONSIDERED AND RETURNED UNOPENED. THE TIME OF RECEIPT WILL BE DETERMINED BY THE TIME RECEIVED IN THE PURCHASING AGENT'S OFFICE. IT IS THE SOLE RESPONSIBILITY OF THE FIRM FOR ASSURING THAT THE RFP IS RECEIVED IN THE PURCHASING OFFICE BY THE DESIGNATED DATE AND TIME. NO FAXED, ELECTRONIC OR ORAL RFP WILL BE ACCEPTED.

OUR AREA IS NOT A GUARANTEED OVERNIGHT FED EX DELIVERY DROP OFF LOCATION. IT IS THE SOLE RESPONSIBILITY OF THE VENDOR TO ENSURE SUBMITTAL IS RECEIVED IN THE PURCHASING OFFICE ON DATE AND TIME SPECIFIED. SUBMITTALS RECEIVED AFTER THE SPECIFIED DAY AND TIME WILL NOT BE OPENED. THE PURCHASING DEPARTMENT IS CLOSED ON ALL FRIDAYS.

Central Purchasing will be closed on July 2, 2020 in observance of Independence Day.

To be considered, Firm/Team must submit one (1) original and one (1) digital copy on USB thumb drive of their proposal. (***PROPOSED FEE FOR MARKETING RESEARCH SERVICES IS TO BE SUBMITTED SEPARATELY***) in a sealed envelope or package, clearly marked with the Firm/Team's name and address, and the words "Marketing Research Services" addressed to:

Office of Central Purchasing
176 Montgomery Circle
DeFuniak Springs, Florida 32435

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SECTION 1 – INTRODUCTION:

The purpose and intent of this Request for Proposal is to ultimately select a qualified Marketing Research firm to serve and for consulting, based on marketing research findings, the Walton County Tourist Development Council (TDC). The selected firm will additionally design, conduct, analyze and report specific marketing research projects to fulfill the information needs of the TDC and its consultants, and to aid in the successful marketing of Visit South Walton.

SECTION 2 – SCOPE OF WORK

The TDC seeks a firm with the expertise to provide the following tasks:

2.1 Planned Projects [12-month term with an option to renew for three additional one-year terms]

A. Visitor Tracking Study - continue quarterly study cycle

- Seasonally tracks the experience that visitors have in South Walton
- Monitors delivery of our brand promise
- Uncovers, as early as possible, any perceptions that we need to alter to maintain and grow loyalty
- Provides impact measurement for advertising, the website, and public relations
- Captures visitor spending in a spread of categories

B. Product Definition Study - continue quarterly study cycle

- Seasonally catalogs the current lodging inventory in terms of:
 - Available units
 - Average daily rates
 - Average occupancy
 - Average length of stay
 - Average party size
- Provides basis for calculating overnight visitor counts

C. Conversion Study

- Annually measures the conversion of requesting information to visiting Beaches of South Walton
- Calculates the ROI for media modes used to motivate visitation to Beaches of South Walton

D. Travel and Tourism Impact Study

- Annually profiles and explores the dynamic of tourism business (Leisure, Seasonal and Group)
- Quantifies the total impact for Walton County

E. Brand Advertising Study

- Ad message testing on potential visitors
- Measure interest levels and rate of positioning of themes
- Survey aided and unaided recall of advertising among study participants
- Measure effectiveness of advertising, public relations and digital/social marketing efforts

[Additional 12-month term studies to also be conducted – if future 1-year term(s) are contracted]

F. Market Perception Study

- Annually measures awareness and perceptions among the destination’s target prospects
- Assesses the competitive leisure travel market in the minds of Visit South Walton (VSW) target prospects to provide strategic guidance to defend and cultivate market share
- Measures specific market demand and brand growth
- Provides market by market communications guidance
- Survey perception of tourism and TDC among locals and partners (bed tax collectors/BTC).

G. Marketing Alignment Study

- Annually measures and tracks the marketing efforts of destination brand partners so as to align efforts between the TDC and these partners
- Identifies the support that partners need and want
- Extracts co-op opportunities that fit with the marketing needs of the brand partners

H. Potential Visitor Study

- Survey travel population trends
- Identify behavioral differences between visitors selecting VSW and those loyal to other regions
- Examine current trends for decision making and methods

I. PRIZM/Lifestyle Profile Analysis – every three years (2017)

- Profiles South Walton visitors in great detail (psychographics)

- Identifies target groups with the highest potential
- Determines which markets offer the most potential
- Uncovers which media options offer unique potential

J. Ad Hoc Studies, if needed, such as:

- Website Usability Testing
- Beach Program Surveys
- Behavioral Consumer Study

K. Situational Studies, if needed, such as:

- Post-Hurricane Study
- Gulf Oil / Natural Disaster Perception Study
- Lapsed Visitor Study

L. Additional Services:

- Ongoing Consultation to staff, agencies and partners on decisions that need research backing.
- Review of materials for internal marketing research efforts
- Monthly agency coordination calls
- 4-6 annual presentations to council and staff, to committees and individual partners
- 1-3 strategy meetings per year
- Workshop VSW team about internal research tactics, concepts and research process
- Any additional studies deemed necessary by the executive director

2.2 Description and Timing of Work

A. Visitor Tracking Study – quarterly

- Establish connections with lodging partners to collect visitor contact information
- Add questions to address any new issues
- Circulate questionnaire to staff and agencies for any additional input
- Make questionnaire program changes
- Conduct telephone interviews
- Process and cross-tabulate data
- Conduct analysis
- Produce a destination report
- Present results at TDC council meeting
- Present results to marketing committee
- Reference trends to past survey results

Spring (March, April, May)

Work begins June 1st of each year

<i>Summer (June, July, August)</i>	<i>Work begins September 1st of each year</i>
<i>if future one-year term(s) are contracted also includes</i>	
<i>Fall (September, October, November)</i>	<i>Work begins December 1st of each year</i>
<i>Winter (December, January, February)</i>	<i>Work begins March 1st of each year</i>

B. Product Definition Study - quarterly

- Collect average daily rate, average occupancy, average party size and average length of stay from properties
- Process data
- Produce a destination report
- Present results at council meeting
- Present results to marketing committee
- Reference trends to past survey results

<i>Spring (March, April, May)</i>	<i>Work begins June 1st of each year</i>
<i>Summer (June, July, August)</i>	<i>Work begins September 1st of each year</i>
<i>if future 1-year term(s) are contracted also includes</i>	
<i>Fall (September, October, November)</i>	<i>Work begins December 1st of each year</i>
<i>Winter (December, January, February)</i>	<i>Work begins March 1st of each year</i>

C. Conversion Study - annually

- Coordinate with TDC staff to obtain sample of information requestors
- Make any needed questionnaire changes
- Conduct online and telephone interviews, based on provided contact information
- Process and cross-tabulate data
- Conduct analysis and related to KPI, ROI
- Produce a destination report
- Present results at council meeting

Schedule to be determined

D. Travel & Tourism Impact Study - annually

- Send questionnaires to major venues and properties in Walton County that host group events - annually
- Query Walton County public records (licenses, permits, etc.)
- Process and cross-tabulate data
- Conduct analysis and report
- Produce a dashboard showing direct economic impact, gross income to lodging, gross income to other businesses in the county, direct tax income to Walton County, number of visitors brought,

room nights generated, and number of employees serving the business

- Present results at council meeting

Schedule to be determined

E. Brand Adverting Study - annually

- Obtain representative sample by market
- Adopt current marketing to make questionnaire changes as needed
- Conduct online and telephone interviews, based on provided contact information
- Process and cross-tabulate data
- Conduct analysis
- Produce a destination report
- Present results at council meeting

Schedule to be determined

F. Market Perception Study – annually

- Purchase sample by market and PRIZM code
- Add questions to address any new issues
- Circulate questionnaire to staff and agencies for any additional input
- Make questionnaire program changes
- Conduct telephone interviews
- Process and cross-tabulate data
- Conduct analysis
- Produce a destination report
- Present results at council meeting
- Present results to marketing committee

Schedule to be determined

G. Marketing Alignment Study - annually

- Develop questionnaire to suit TDC informational needs
- Circulate questionnaire to staff and agencies for any additional input
- Distribute questionnaires to in-destination brand partners
- Process and cross-tabulate data
- Conduct analysis
- Produce a destination report
- Present results at council meeting
- Present results to marketing committee

Work begins March each year

H. Potential Visitor Study - annually

- Obtain representative sample by market and actual guest sample for study and comparison
- Conduct online and telephone interviews, based on leading industry trends and behavior
- Process and cross-tabulate data
- Conduct analysis
- Produce a destination report
- Present results at council meeting

Schedule to be determined

I. PRIZM Profile Analysis – every three years

- Collect addresses of those that stayed in overnight accommodations in Walton County during the previous year, from as many properties as possible
- Geo-code addresses
- Run through PRIZM profiling software
- Produce actionable report based on PRIZM output
- Calculate market potential and penetration trends
- Present results at council meeting
- Present results to marketing committee

Study projected in corresponding future date

2.3 Proposal Requirements:

Firms interested in submitting a response to this RFP should include the following information at a minimum and the proposal should address the requirements in a clear and concise manner in the order stated herein.

Proposal must be tabbed as follows and must include the information and documentation specified in the applicable tab.

Respondents shall construct their proposal in the following format and a tab must separate each section. Your proposal shall be submitted in a separate sealed envelope marked “Proposal”.

TAB 1 – Executive Summary

- Present in brief, concise terms, a summary of your proposal, your company and its capabilities.

- Provide the name of the person(s) who will be authorized to make representations for the respondent, their titles(s), address, and telephone and fax numbers.
- Provide the name and title of the person who would be assigned to be the days-to-day point of contact for this account

TAB 2 – Marketing Research Experience

- Discuss the overall marketing research experience of your firm
- Discuss the marketing research experience of the day-to-day point person who would be assigned to this account.
- Discuss specific travel & tourism marketing research experience of the day-to-day person who would be assigned to this account.
- Provide the marketing research experience of other key persons who would work on the projects outlined in the scope of work.

TAB 3 – Ability to Execute Scope of Work

- Discuss your firm’s ability to manage and execute the scope or work as addressed in the RFP.
- List projects completed in the past two (2) years similar to those described in the RFP. For each, provide a brief description and client contact information.
- Provide three (3) references of related past experience to include at a minimum, a contact person, company name, phone number, fax number and email address.

TAB 4 – Proposal Cost – *this should be in a separate sealed envelope.*

For each listed below, provide a complete and total cost for that item;

- Annual cost of Visitor Tracking Study
- Annual cost of Product Definition Study
- Cost of Market Perception Study
- Cost of Marketing Alignment Study (assume 4 times per year)
- Cost of Conversion Study
- Cost of Group Business Study
- Cost of ongoing and continuous consultation to staff, agencies and partners.
- Cost of six (6) annual presentations or attendance to council, to staff, to committees and individual partners, exclusive of travel costs, (allow 2-3 days per presentation series, plus travel time)
- Cost of attending three (3) strategy meetings per year, exclusive of travel costs, (allow one day for each plus travel time)
- GRAND TOTAL OF ALL TEN ABOVE ITEMS (\$ PROPOSAL FEE)

in the RFP package at the Office of Central Purchasing. Proposals received late will not be considered.

3.5 Cost of Preparing RFP:

The County is not liable for any costs incurred by a firm in responding to this RFP, including those for oral presentations.

3.6 Disposals of RFP:

All RFP's become the property of the County and will be a matter of record.

3.7 Rules for Withdrawal:

Proposals may be modified or withdrawn by an appropriate document duly executed (in the manner that a RFP must be executed) and delivered to the place where Request for Proposal are to be submitted at any time prior to the opening of RFP.

Any submitted Proposal shall remain valid for 30 days after the submission date, but the county at its sole discretion may release any proposal.

3.8 Rejection of Proposal:

The County reserves the right to accept or reject any all proposals as may be deemed necessary by the County to be in its best interest. The County further reserves the right to waive any and all informalities, and reserves the right to reject all nonconforming, unresponsive, unbalanced or conditional Proposals. The County reserves the right to reject the Proposal of any Proposer if the County believes that it would not be in the best interest of the Project to make an award to that Proposer, because the Proposal is not responsive or responsible, or the Proposer is unqualified or of doubtful financial ability or fails to meet any other pertinent standard or criteria established by the County. The County also reserves the right to enter into contract negotiations with a qualified, responsible, and responsive Proposer who submits the best ranked proposal. If the County and the best Proposer cannot negotiate a successful contract the County may terminate such negotiations and begin negotiations with the qualified, responsible, and responsive Proposer who submits the next best ranked proposal. No Proposer shall have any rights against the County arising from such negotiations. Discrepancies in the multiplication of units of work and unit prices will be resolved in favor of the unit prices. Discrepancies between the indicated sum of any column of figures and the correct sum thereof will be resolved in favor of the correct sum. Where numeric data is given both in Arabic numerals and in written language, and where there exists a discrepancy between an Arabic numeral and written language, the written language shall be presumed to be correct and the Arabic numeral presumed incorrect.

The County reserves the right to delete any Proposal items and the total Proposal shall be determined as the sum of the Proposal items awarded. In evaluating Proposals, the county will consider the qualifications of the proposers, whether or

not the Proposals comply with the prescribed requirements, time of completion and other data, as may be requested in the Proposal form or prior to the Notice of Award. The County may conduct such investigations as the County deems necessary to assist in the evaluation of any Proposal and to establish the responsibility, qualifications and financial ability of Proposers, proposed Subcontractors, Suppliers and other persons and organizations to perform and complete the Project in accordance with the Contract Documents to the County's satisfaction within the prescribed time. The County may consider the operating costs, maintenance requirements, performance data and guarantees of major items of materials and equipment proposed for incorporation in the Project when such data is required to be submitted prior to Notice of Award.

3.9 Sales and Use Tax:

The PROPOSER agrees that any and all applicable federal, state and local sales and use taxes that are incurred by the PROPOSER are included in the stated bid price for the Project. The County is tax exempt from federal excise and state sales tax.

3.10 Verbal Instructions:

No negotiations, decisions, or actions shall be initiated or executed by the firm as a result of any discussions with any county employee. Only those communications from firms, which are signed, and in writing will be recognized by the County as duly, authorized expressions on behalf of the firm. Oral and other interpretations or clarifications will be without legal effect.

3.11 Public Entity:

The firm must sign and complete a Public Entity Crime Sworn Statement as defined under Section 287.133(3) (a), F.S. A person or affiliate who has been placed on the convicted vendor list following a conviction of a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a consultant, supplier, or subcontractor, under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

3.12 Drug Free Workplace:

The firm must complete the County's Drug Free Workplace Certification form, attached and made a part of the RFP. According to Walton County policy, preference shall be given to businesses with drug-free work place programs. Whenever two or more proposals, which are equal with respect to price, quality, and service, are received by the state or by any political subdivision for the procurement of commodities or contractual services, a proposal received from a business that certified that it has implemented a drug-free work place program shall be given preference in the award process. Established procedures for

processing tie proposals will be followed if none of the tied vendors have a drug-free workplace program.

3.13 Identical Tie Proposals:

In the event of a tie between proposals responsive to this RFP, the Board of County Commissioners shall make the final determination as to the winning proposal.

3.14 Addendums:

The County may issue Addendums to modify the proposal as deemed appropriate. Addendums and clarification to this RFP along with an Addendum Acknowledgement Form will be emailed/faxed to all Contractors receiving this RFP. The Addendum Acknowledgement Form, which is included with each mail out, shall be signed by an authorized company representative, dated, and returned with proposal. Attached is a sample of the Addendum Acknowledge Form.

3.15 Notices:

Any notices to be given under this RFP shall be given by email/fax addressed to PROPOSER at its address stated herein, and to the COUNTY at its address stated herein. Additional notice may also be given by email/fax in which case it shall be deemed that notice was provided on the date said email/fax was received. The party providing notice by email/fax shall confirm that the email/fax was received by the other party.

3.16 Representation:

The PROPOSER represents to the County that:

- A. The PROPOSER is properly certified and licensed; is solvent financially; is experienced in and competent to complete the Project.

Before the Contract is awarded the County will conduct such investigations as necessary to determine the performance record and ability of the PROPOSER to perform the size and type of Project specified under the Contract.

- B. The PROPOSER is familiar with all Federal, State, Local or other regulatory laws, ordinances and regulations, which in any manner whatsoever, may affect the Project.

3.17 Bonds:

All proposals shall be accompanied by a bid security in an amount of ONE THOUSAND AND 00/100THS DOLLARS (\$1,000.00) made payable to Board of County Commissioners, Walton County. The Surety or insurance company must be authorized to conduct business in the State of Florida having an A.M. Best rating of V-A or better and who is listed on the United States Treasury Department's T-list as acceptable to issue bonds for the applicable dollar amount.

The bid security of the Successful Proposer will be retained until such Proposer has executed the Contract, and has furnished the required Certificates of Insurance. If the successful Proposer fails to execute and deliver the Contract, or furnish Certificate of Insurance, within five (5) business days after the Notice of Award, the County may annul the Notice of Award and the bid security of that Proposer will be forfeited. The proposal security of other proposers may be retained by the County until ten (10) calendar days after the Notice of Award, whereupon proposal security furnished by such proposers will be returned.

Failure to submit an appropriate proposal security shall result in the proposal being declared unresponsive.

3.18 Protest:

Any person or entity whose proposal is rejected, in whole or in part, or who submits a proposal but is not awarded the contract, may protest such decision. Written notice of intent to file a proposal protest must be submitted with the Purchasing Agent or Finance Director within twenty-four (24) hours after the Board's declaration of its intention with regard to an award. Written protest must be submitted to the Purchasing Agent or Finance Director within ten (10) calendar days after filing written notice of intent.

Each written protest must be accompanied by a protest bond in the form of a certified check, cashier's check or money order made payable to the Board of County Commissioners, in an amount not less than five percent (5%) of the lowest responsible proposal received by the County.

The condition of the protest bond shall be that, should the protest be determined to be without merit and non-valid, the bond shall be forfeited to the County in its entirety.

3.19 Insurance Requirements:

Firm shall purchase and maintain through the Contract period workers compensation, comprehensive general liability (occurrence form), comprehensive automobile liability, professional liability, including error and omissions coverage if applicable, builder's risk, and other insurance as is appropriate for the Project being performed hereunder by firm, its employees, subcontractors or agents. The amounts and types of workers compensation, comprehensive general liability (occurrence form), and comprehensive automobile liability insurance shall conform to the following minimum requirements:

1. Worker's Compensation Coverage must apply for all employees and statutory limits in compliance with the applicable state and federal laws, unless Consultant provides a current Florida Workers Compensation exemption certificate. In addition, the policy must include the following:
 - a. Employer's Liability with a minimum limit per accident in accordance with statutory requirements.

- b. Notice of Cancellation and/or Restriction. The endorsed to provide the COUNTY with thirty (30) days' written notice of cancellation and/or restriction.
- 2. Comprehensive General Liability Coverage must include:
 - a. \$1,000,000 combined limit per occurrence for bodily injury, personal injury and property damage. If contract is less than \$100,000.00, then general liability insurance requirement is \$300,000.00.
 - b. Contractual coverage applicable to this specific contract, including any hold harmless and/or indemnification agreement.
 - c. Notice of Cancellation and/or Restriction. The policy must be endorsed to provide the COUNTY with thirty (30) days' written notice of cancellation and/or restriction.
- 3. Comprehensive Automobile Liability Coverage must be afforded on a form no more restricted than the latest edition of the Comprehensive Automobile Liability Policy filed by the Insurance Services Office and must include:
 - a. \$300,000 combined single limit per accident for bodily injury and property damage.
 - b. Owned Vehicles.
 - c. Hired and Non-Owned Vehicles.
 - d. Employee Non-Ownership.
 - e. Additional Insured. County is to be specifically included as an additional insured.
 - f. Notice of Cancellation and/or Restriction. The policy must be endorsed to provide the COUNTY with thirty (30) days' written notice of cancellation and/or restriction.
- 4. Professional Liability Coverage must include:
 - a. Minimum limits of \$1,000,000 per occurrence and in the aggregate for claims of malpractice, negligence, error and omissions,
 - b. Notice of Cancellation and/or Restriction. The Policy must be endorsed to provide the County with Thirty (30) days' prior notice of cancellation and/or Restriction of coverage by changed exclusion.

Certificates of Insurance evidencing the insurance coverage specified in this Article shall be submitted to the COUNTY with the executed Contract. The Certificates of Insurance shall be filed with the COUNTY before this Contract is deemed approved by the COUNTY. The required Certificates of Insurance not only shall name types of policies provided, but also shall refer specifically to this Contract. All the policies of insurance so required of VENDOR shall be endorsed to include as additional insured the COUNTY, its officers, employees, and agents, except for

Worker's Compensation. If the initial insurance policy expires prior to completion of the Project, renewal Certificates of Insurance shall be furnished thirty (30) days prior to the date of the policy expiration.

The purchase of any of the above-referenced insurance policies shall not release the VENDOR or any Surety created by this Contract from any obligation, warranty or guarantee provided in this Contract.

The Insurance Company(ies) shall be authorized to conduct business in the State of Florida. Any risk of loss of completed work on the Project, or work in progress on the Project, equipment and material stored on or off the Project Site, or in transit, shall be borne by the Firm through the date of final completion for the Project.

3.20 Local Vendor Preference:

Award of the contract for this project shall be subject to local preference in accordance with the Walton County Purchasing Policies and Procedures (PP017). Application for Local Preference is attached to this Request for Proposal.

3.21 Blackout Period:

The period between the end of the advertisement for the Request for Proposal, Request for Qualifications, Invitation to Bid, or any other competitive solicitation and the contract award, or any resulting bid protest is resolved, or the solicitation is otherwise canceled is referred to as the Blackout Period. During the Blackout Period any communication regarding the aforementioned solicitations is prohibited between the bidder (or its agents or representatives) or other entity with the potential for a financial interest in the award (or their respective agents or representatives) regarding such competitive solicitation, and any County Commissioner or County employee, selection committee member or other persons authorized to act on behalf of the Board including the County's Architect, Engineer or their subconsultants, or anyone designated to provide a recommendation to award a particular contract, other than Purchasing Division staff. Each competitive solicitation shall provide notice of the Blackout Period.

1. Exceptions to the Blackout Period

The Blackout Period shall not apply to:

- a. Communications at any public proceeding or meeting, including pre-bid conferences, selection committee presentations or pre-award meetings,
- b. Communications during contract negotiations between designated County employees and the intended contract awardee.
- c. Communication with a vendor by a Purchasing Division employee following the bid opening to clarify the vendor's bid or intended scope of services.
- d. Communication following the filing of a protest between the protesting party and the Purchasing Division, County Administrator's Office and County Attorney's Office, during the dispute resolution process.

- e. Purchases exempt from competitive selection, sole source procurements, single source procurements, and emergency procurements, as defined in Walton County Board of County Commissioners Purchasing Policy and Procedure manual.
- f. Communications with existing vendors in the performance of existing contracts.

3.22 Indemnifications:

Contractor shall indemnify and save harmless the County, its officers, agents, and employees, from all claims, suits or actions at law or equity, damages, losses, and expenses, whether direct or indirect, or consequential, including but not limited to charges of engineers, attorneys and other professionals and costs of both defense and appeal, in a court of law or other tribunal, for any reason whatsoever, including but not limited to bodily injury, sickness, disease or death of any persons, including employees of Contractor or any subcontractor, or injury to or destruction of property, including loss of use, which claims are arising out of, related to, connected with, or caused by (a) Contractor's, or any subcontractor or supplier of contractor, negligent performance or non-performance of the Project; (b) Defective Work, whether by Contractor, or any subcontractor or supplier of Contractor; (c) the failure of contractor of any subcontractor of Contractor to provide a safe work place; (d) noncompliance with federal, state, and local laws and regulations by Contractor, or any subcontractor or supplier of Contractor; (e) the failure of Contractor, or any subcontractor, or supplier of Contractor to obtain or renew the insurance coverage's required by the Contract Documents; or (f) claims for damages to the Project itself, and claims for any other costs which any of them may incur arising from failure, neglect, or refusal of Contractor to faithfully perform the Project and other obligations under the Contract Documents. The provisions of this indemnification agreement shall include all accidents, injuries and claims made, whether or not caused in part, by any act or omission of the County, its respective officers, agents, or employees, provided Contractor shall not be required to indemnify the County for the County's own negligence. Contractor shall, at its own cost and expense, defend such claims, actions or proceedings which are subject to this indemnification agreement, whether groundless or not, which may be commenced against the County and Contractor shall pay any and all judgments which may be recovered in any such action, claim, proceeding, or suit, excluding that proportion of any judgment for which the County may be found negligent, and defray any and all expenses including costs and attorney's fees, which may be incurred in or by reason of such action, claim, proceeding or suit. The County and Contractor agree that one percent (1%) of the total compensation to the Contractor for performance of this contract is the specific consideration from the County to the Contractor for Contractor's indemnity agreement.

Contractor shall pay all license fees and royalties and assume all costs incident to the use in the performance of the Project or the incorporation in the Project of any invention, design, process, product or device which is the subject of patent rights

or copyrights held by others. Contractor shall indemnify and hold harmless the County, its officers, Commissioners, employees, agents and other consultants of each and any of them from and against all claims, costs, losses and damages arising out of or resulting from any infringement or patent rights or copyrights incident to the use in the performance of the Project or resulting from the incorporation in the Project of any invention, design, process, product or device not specified in the Contract Documents.

3.23 Public Access:

A request to inspect or copy public records relating to this Contract must be made directly to the County. If the County does not possess the requested records, it shall immediately notify the Consultant of the request, and the Consultant must provide the records to the County or allow the records to be inspected or copied within a reasonable time (§119.0701(3)). If Consultant fails to provide the public records within a reasonable time, Consultant may be subject to penalties under §119.10, F.S.

A. Consultant shall comply with the requirements of Florida's Public Records law. In accordance with Section 119.0701, Florida Statutes, the Consultant shall (1) Keep and maintain public records required by the public agency to perform the service; (2) Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided under Florida's Public Records law or as otherwise provided by law; (3) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of this contract if the Consultant does not transfer the records to the public agency; and (4) Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of the Consultant or keep and maintain public records required by the public agency to perform the service. If the Consultant transfers all public records to the public agency upon completion of the contract, the consultant shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Consultant keeps and maintains public records upon completion of this contract, the Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from public agency's custodian of public records, in a format that is compatible with the information technology system of the public agency.

B. IF CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT,

CONSULTANT SHALL CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

**Genara Roop, Records Management Liaison Officer
161 E. Sloss Avenue
DeFuniak Springs, Florida 32433
850-892-8110
roogenara@co.walton.fl.us**

SECTION 4 – CONTENTS OF PROPOSAL

This section contains instruction regarding the format of the RFP that are to be submitted.

4.1 Contact for Contract Administration:

Firms shall return the Contact for Contract Administration Form. This shall be the firm’s representative from the day-to-day activities of this contract. The signer shall have the authority to bind the firm to the submitted proposal.

4.2 Forms:

It is Mandatory that firms return the Drug Free Workplace Certification Form, Information Sheet, Contact for Contract Administration Form, Unauthorized Aliens Form along with the Public Entity Crime Form.

SECTION 5 – EVALUATION OF PROPOSALS:

TDC shall evaluate and rank proposals based on the following categories. Companies selected as finalist will be required to submit five (5) additional copies of their submittals for the Review Panel, and shall be available for presentation/interviews, if required, on a date determined by the TDC. Sufficient notice will be given.

Criteria	Weight Score
Marketing research experience	40
<ul style="list-style-type: none">• Overall research experience of firm.• Marketing research experience of the day-to-day point person.• Travel and tourism marketing research experience of the day-to-day point person.• Marketing research experience of other key person who would work on the projects outlined in the scope of work.	
Ability to execute scope of work	50
<ul style="list-style-type: none">• Firms ability to manage and execute the scope of work.	

- Projects completed in the past two (2) years similar to those described in the RFP.
- Provided three (3) references of related past experience

Proposal fee

10

- Includes annual cost of Visitor Tracking Study
- Includes annual cost of Product Definition Study
- Includes cost of Marketing Perception Study, Marketing Alignment Study, Conversion Study, Group Business Study.
- Cost of ongoing and continuous consultation to staff, agencies and partners included.
- Cost of six (6) annual presentations or attendance to council, to staff, to committees and individual partners included.
- Includes cost of attending three (3) strategy meetings per year.

After negotiations are conducted, TDC shall recommend to the Board of County Commissioners to award a contract to the most responsive and responsible firm that TDC determines will provide the best value to TDC.

SECTION 6 – TERM OF CONTRACT:

This term shall be for one (1) year, with the option of three (3), one-year extensions each at the sole discretion of the County, unless earlier terminated by the Board of the County Commissioners.

The County may terminate this Agreement at any time with or without cause, or with or without prior notice when it is in the best interest of the County.

**Information Sheet
For Transactions and Conveyances
Corporate Identification**

The following information will be provided to the Walton County Legal Services for incorporation in legal documents. It is, therefore, vital all information is accurate and complete. Please be certain all spelling, capitalization, etc. is exactly as registered with the state of federal government,

(Please circle one)

Is this a Florida Corporation:

Yes or No

If not a Florida Corporation,

In what state was it created? _____

Name as spelled in that State: _____

What Kind of corporation is it:

“For Profit” or “Not for Profit”

Is it in good standing:

Yes or No

Authorized to transact business

In Florida: Yes or No

State of Florida Department of State of Certificate of Authority Document No: _____

Does it use a registered fictitious name: Yes or No

Name of Officers:

President: _____ Secretary: _____

Vice President: _____ Treasurer: _____

Director: _____ Director: _____

Other: _____ Other: _____

Name of Corporation (As used in Florida):

(spelled exactly as it is registered with the state or federal government)

Corporate Address:

Post Office Box: _____

City, State, Zip _____

Street Address: _____

City, State, Zip: _____

(Please provide post office box and street address for mail and/or express delivery; also for recorded instruments involving land)

Federal Identification Number: _____

(For all instruments to be recorded, taxpayer’s identification is needed)

Name of individual who will sign the instrument on behalf of the company:

(Upon Certification of Award, the President or Vice-President shall sign Contract. Any other officer shall have permission to sign via a resolution approved by the Board of Directors on behalf of the company. Awarded contractor shall submit a copy of the resolution together with the executed contract to the Office of Purchasing)

(Spelled exactly as it would appear on the instrument)

Title of the individual named above who will sign on behalf of the company:

CONTACT FOR CONTRACT ADMINISTRATION

Designate one person authorized to conduct contract administration.

NAME: _____

TITLE: _____

COMPANY NAME: _____

ADDRESS: _____

TELEPHONE NO: _____

FAX NO: _____

SIGNATURE: _____

E-MAIL: _____

PUBLIC ENTITY CRIMES

**Sworn Statement Under Section 287.133(3) (a),
Florida Statutes, on Public Entity Crimes**

This form must be signed in the presence of a Notary Public or other officer authorized to administer oaths:

This sworn statement is submitted to The Board of County Commissioners,
Walton County, Florida by _____
(print individual's name and title)

for _____
(print name of entity submitting sworn statement)

Whose business address is _____

and (if applicable) its Federal Employer Identification Number (FEIN) is
_____; (if the entity has no FEIN, include the Social Security Number
of individual signing this sworn statement: _____).

I understand that a "public entity crime" as defined in Paragraph 287.133(l)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to an directly related to the transaction of business with any public entity or with an agency or political; subdivision of any other state or of the United States, including, but not limited to, any bid or contract for good or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

I understand that "convicted" or "conviction" as defined in Paragraph 287.133(l) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

I understand that an “affiliate” as defined in Paragraph 287.133(l) (a) Florida Statutes means:

A predecessor or successor of a person convicted of a public crime; or; an entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term “affiliate” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm’s length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

I understand that “person” as defined in Paragraph 287.133(l) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term “person” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. [Indicate which statement applies.]

_____ Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members,

or agents who are active in the management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administration Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity Submitting this sworn statement on the convicted vendor list. [Attach a copy of the final order.]

I understand that the submission of this form to the contracting officer for the Public Entity identified in Paragraph ONE (#1) above is for that Public Entity only, and that this form is valid through December 31 of the calendar year in which it is filed. I also understand that I am required to inform the Public Entity prior to entering into a contract in excess of the threshold amount provided in Section 287.017, Florida Statutes, for category two of any change in the information contained in this form.

Name of Bidder

By: _____

Title: _____

STATE OF _____
COUNTY OF _____

Sworn to and subscribed before me by means of ___ physical presence or ___ online notarization, on this __ day of _____, 2020.

Personally, known to me __, or produced the following identification as proof of identity. _____ .

Notary Public
My Commission Expires: _____

{ SEAL }

DRUG FREE WORKPLACE CERTIFICATION
(This form must be completed and attached to proposal)

Identical tie bids: preference shall be given to businesses with drug-free work place programs. Whenever two or more bids which are equal with respect price, quality, and service are received by the state or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certified that it has implemented a drug-free work place program shall be given preference in the award process. Established procedures for processing tie bids will be followed in none of the tied vendors have a drug-free work place program. In order to have a drug-free work place program, a business shall:

1. **Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the work place specifying the actions that will be taken against employees for violations of such prohibition.**
2. **Inform employees about the dangers of drug abuse in the work place, the business's policy of maintaining a drug-free work place, available drug counseling, rehabilitation providing employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.**
3. **Give each employee engaged in providing the commodities of contractual services that are under bid a copy of the statement specified in paragraph #1.**
4. **In the statement specified in paragraph #1, notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of or pleas of guilty or no contest to, and violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the work place no later than five (5) days after such conviction.**
5. **Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.**
6. **Make a good faith effort to continue to maintain a drug-free work place through implementation of this section.**

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

Company Name

Authorized Signature

Federal I.D. Number or SSN

Printed Name

**WALTON COUNTY
LOCAL PREFERENCE APPLICATION**

PROJECT NAME: Marketing Research Services
RFP NO: 020-021

Name of Business: _____

Address: _____

City, State: _____ Zip code: _____

I hereby certify under penalty of perjury that my business qualifies as a local vendor/contractor in accordance with Walton County Purchasing Policies and Procedures, Procedure No: PP017.

My business maintains its principal place of business within Walton County; OR

My business has maintained a permanent place or places of business within Walton County and has employed people who live in Walton County on a regular and continuing basis for at least six (6) months prior to the advertising of this Request for Proposal

Signature

Date: _____

**Board of County Commissioners
Walton County, Florida
UNAUTHORIZED ALIENS**

Inasmuch as the employment of unauthorized aliens is prohibited by §448.09, Florida Statutes. The County prohibits contracting with firms that knowingly utilize services of unauthorized aliens in the performance of contracts for goods or services with the County. Additionally such firms may not knowingly contract with sub-contractors who utilize the services of unauthorized aliens.

By signing below the bidder swears or affirms that:

His/her company does not knowingly utilize the services of unauthorized aliens in the performance of contracts. The company agrees that the County may conduct random checks of personnel records as they pertain to this issue. Violation of this requirement may result in immediate termination of the contract. Additionally violation of this requirement may result in the company being prohibited from submitting bids/proposals for County contracts for a period of five years. (See Procedure PP-022, Walton County Purchasing Policies and Procedures Manual.)

Signature

Printed Name

Title

Date

STATE OF _____
COUNTY OF _____

Sworn to and subscribed before me by means of ___physical presence or ___online notarization on this _____ day of _____, 2020.

Notary Public
My commission expires _____

{ SEAL }

QUESTIONS AND ANSWERS
RFP 020-021
MARKETING RESEARCH SERVICES

QUESTION: Section 2.1 D includes “Leisure, Seasonal, Group” in the description of the requested scope, but in Section 2.2 D only Group is specified as a breakout, Do you require travel impacts breakouts by season and for leisure vs. business travel?

ANSWER: *Leisure information is reported by season, but groups is only broken out in the annual report.*

QUESTION: Does the County currently subscribe to any tourism databases/Information sources and if so, which ones” For example, STR data on hotel occupancy, AirDNA information on peer to peer home rentals, PRIZM.

ANSWER: *We currently subscribe to KeyData*

QUESTION: Section 2.2 Description and Timing of Work – is prescriptive in what should be accomplished for each study. Is the County open to other recommendations that can potentially enhance the overall project? For example, the Visitor Tracking Study calls for telephone interviews specifically. Are you open to other methodologies such as online or in-person?

ANSWER: *Yes, we are open to other suggested methodologies.*

QUESTION: For the Visitor Tracking Study in particular, is there a targeted sample size you hope to have each quarter?

ANSWER: *No, as long as there are enough participants to ensure a representative sample,*

QUESTION: What is the overall, annual budget for the ten items listed on page 10, Tab 4, Proposal Cost?

ANSWER: *Our current budget for all research is \$170,000 - \$225,000.*

QUESTION: In the Scope of work there are a number of studies which are very inter-related and could benefit in terms of the quality of the resultant report, its usefulness, and its cost through some integrations. For example, brand advertising and market perception studies are often done in concert. Similarly, the Visitor Tracking Study could potentially serve as the inputs for the Product Definition Study. If we recommend combining and integrating these efforts, should we describe our approach in TAB 3 where we discuss our abilities to do this, or should this be done in some other fashion?

ANSWER: *Yes, that would be acceptable way to convey your proposal*

QUESTION: We have what we believe are better methodologies for some of the studies, such as the Visitor Tracking Study, which will provide better data at a lower price. Are you open to alternative methodologies?

ANSWER: *Yes, we are*

QUESTION: For the marketing alignment study, the scope of work indicates that it is an annual study, but the pricing asks for costs for a quarterly study. Can you please clarify?

ANSWER: *There should be a report, as well as seasonal studies (spring, summer, fall and winter visitor tracking)., The annual report combines the seasonal input for a general, overall view.*

QUESTION: In Section 2.2, in the timing and implementation there are some details that don't seem to align with the current methodologies. For example, in the Visitor Tracking Study section 2.2 talks about conducting telephone interviews, while the actual study indicates that it is a combination of on-line and in-person interviews. Can you please clarify?

ANSWER: *Best collection method is allowable for specific circumstances. This can include telephone combination online and in-person. It is generally considered best practice to include significant in-person collection to ensure quality/reliable results.*

QUESTION: What is the total budget for these projects?

ANSWER: *Current annual budget for all research activities is \$175,000 - \$225,000*

QUESTION: Are there separate budgets for each project? If So, what are the budgets for each project?

ANSWER: *Current annual budget for all research activities is \$175,000 - \$225,000*

QUESTION: In the budget proposal it asks for pricing for “Group Business Study” which isn’t mentioned under the scope of work. And pricing is not asked for the Travel and Tourism Impact study. Can you please clarify?

ANSWER: *The travel and tourism impact study should be part of the annual report which combines the gathered data on seasonal travelers and does not focus on group travel. Therefore, we ask for a specific group business study to be conducted annually.*

QUESTION: The proposal asks for pricing for on-site visits exclusive of travel – does that mean travel is not reimbursed, or is it handled in another way?

ANSWER: *That does mean that travel is not reimbursed.*

QUESTION: If we propose combining some of these projects, how should that be handled in the Proposal Cost since each project needs an individual price?

ANSWER: *State your proposal, list price for each proposed element.*

QUESTION: The cost of marketing research efforts is generally a function of the methodological design used and such factors as the sample size and data collection methods. Are there some guidelines that you want to be followed? And, where in the proposal is it appropriate to present those considerations?

ANSWER: *We will want the study numbers and data collection methods to be easily defensible in terms of providing accurate, reliable data.*

QUESTION: What are the target markets for Walton County Tourist Development?

ANSWER: *Largely the Southeast USA, specifically w target high household income visitors. Visiting the research section of www.visitsouthwaltn.com will provide more specific data, as well as examples of previous studies.*

QUESTION: Does our organization need to be “Authorized to transact business in Florida” to propose, or can this be done if awarded the contract?

ANSWER: *Yes, you will need to be authorized to do business in Florida.*

QUESTION: Does VSW currently conduct a tracking study as described and how long has this tracking study be in place? If a tracking study process currently exists, in the interest of continuity in fielding methodology and questions and for the sake of analytical comparisons, would VSW be sharing a sample questionnaire with methodology once the project is awarded?

ANSWER: *Please refer to our online research, which will continue to be available going forward. It may not be possible to access the original questionnaires:*
<https://www.visitsouthwalton.com/vsw-resource-center/resources/industry-research/>
<https://www.visitsouthwalton.com/vsw-resource-center/reports/>

QUESTION: Once awarded, would VSW share historical lodging catalogs to aid in defining yearly and seasonal trends and enable forecasting of future lodging demand and inventory to meet the demand?

ANSWER: *The research (and more) is available, though specific lodging information would have to be shared directly between the lodging partner and research firm (to prevent the business' private information from becoming public record).*

QUESTION: Once awarded, would VSW provide historical marketing goals, marketing budgets, visitor growth numbers and ROI by media? Does VSW currently employ any analytical tool (s) that track consumer engagement with its messaging through its website and by media?

How does VSW market itself currently including SEO, website, social media ads, paid search, travel magazines, blogs, travel influencers, and traditional media and in what proportions?

Which metrics are tracked - cost per conversion, cost per acquisition, return on ad spend, customer lifetime value, branded search lift, click thru rate, etc.?

ANSWER: *Some of this information would be available. Please refer to the industry research links for examples of current metrics (which will need to be continued):*

<https://www.visitsouthwalton.com/vsw-resource-center/resources/industry-research/>

<https://www.visitsouthwalton.com/vsw-resource-center/reports/>

QUESTION: On what attributes does VSW market itself? What is the current proportion of Leisure, Seasonal and Group travel to VSW? What is VSW's primary appeal? What travel association membership does VSW have? How do visitors typically arrive to VSW – drive or fly?

ANSWER: <https://www.visitsouthwalton.com/vsw-resource-center/resources/industry-research/>

<https://www.visitsouthwalton.com/vsw-resource-center/reports/>

QUESTION: Does VSW advertise now? Has VSW have defined value proposition and brand positioning? What is it? Does VSW currently track its advertising for breakthrough, impact on brand image and intention to visit based on its advertising? Does VSW have a marketing/advertising agency?

ANSWER: <https://www.visitsouthwalton.com/vsw-resource-center/resources/industry-research/>

<https://www.visitsouthwalton.com/vsw-resource-center/reports/>

Current ad agency of record is Zehnder Communications.

QUESTION: What is the current perception and appeal of VSW as a destination and among which demographic is this strongest? Which destinations are strong competitors for visitors to VSW?

ANSWER: <https://www.visitsouthwalton.com/vsw-resource-center/resources/industry-research/>
<https://www.visitsouthwalton.com/vsw-resource-center/reports/>

QUESTION: What is the mechanism or process through which brand partners provide or align with VSW information access needs?

ANSWER: *Our current research firm reaches out to partners – VSW staff assists in making the initial introductions, and often follow up reminders.*

QUESTION: What is VSW’s target visitors - the primary demographics that VSW attracts – solo, family, friends, group? What generation is drawn most to VSW?

ANSWER: <https://www.visitsouthwalton.com/vsw-resource-center/resources/industry-research/>
<https://www.visitsouthwalton.com/vsw-resource-center/reports/>

QUESTION: Given the cultural diversity of travelers today, would VSW be open to exploring other complementary segmentation models – i.e. Claritas Geoscape or Simmons Market research which provide a view to multicultural segments?

ANSWER: *We would be open to exploring segmentation models deemed necessary or offering new insights.*

QUESTION: How has Covid – 19 impacted visitor trends in VSW?
How is the hospitality industry in VSW being affected?
How was VSW trending / meeting visitors’ goals prior / after Covid-19?

ANSWER: *Months impacted by restrictions on travel or booking (March, April, May) showed significant decreases in visitation. Once short-term rentals were again allowed by the state, numbers rebounded to higher visitation rates than in 2019.*

QUESTION: Assuming an ongoing threat of the Covid-19 pandemic, is this project likely to be postpone? Would VSW expect the consulting to team to travel to Walton County

for meetings, workshops, presentations while the Covid-19 threat is high, or would online meetings be acceptable?

ANSWER: Our research needs will continue schedule and we will expect our research partner to be able to deliver our normal studies on schedule. We will consider alternate meeting and info.

This Question/Answer now becomes a part of the original RFP. Acknowledge receipt of this Q&A and include in your submittal. Failure to do so may result in your proposal being found non-responsive.

Proposer_____ By:_____

Address:_____ Phone:_____

City, State:_____ Date:_____

Authorized Signature, Title