



JAMAICA SOCIAL INVESTMENT FUND
“Investing For Community Development”



TERMS OF REFERENCE

**Consultancy for Conducting a Market Demand Study for Jamaica’s Community Tourism
on Behalf of the Jamaica Tourist Board**

1. BACKGROUND

JAMAICA SOCIAL INVESTMENT FUND (JSIF)

The Jamaica Social Investment Fund (JSIF) is a limited liability company incorporated under The Companies Act of Jamaica. It was established in 1996 as a component of the Government of Jamaica’s (GoJ’s) national poverty alleviation strategy. The Fund was designed primarily to channel resources to small-scaled community-based projects. This is done with the use of an Operations Manual that acts as a guide to ensure transparency, accountability and efficiency in project implementation.

The operations of the JSIF were initially funded by a loan negotiated between the GoJ and the World Bank. Though the Fund was initially established as a temporary organization with an initial lifespan of four (4) years, it has been in operation for over twenty-four (24) years; invested an estimated USD 200 million, of which approximately 80% is in infrastructure. Presently the Fund has been charged with executing agreements with international organizations that will continue until 2025.

The mandate of the JSIF is:

The Jamaica Social Investment Fund (JSIF) mobilizes resources and channels these to community-based socio-economic infrastructure and social services projects. Through a national partnership between central and local government, communities and private and public organizations, the JSIF addresses the immediate demands of communities in a manner that is quick, efficient, effective, transparent and non-partisan.

2. PROJECT CONTEXT

JSIF is currently implementing the Second Rural Economic Development Initiative (REDI II) on behalf of the Government of Jamaica. REDI II is financed in part with a USD 40 million loan from the World Bank (Loan agreement No. 9017-JM) and approximately USD 2 million from beneficiaries’ cash contributions. The project will be implemented through 2025, in support of the strategic priorities of both line Ministries, Agriculture & Tourism. The Project Development Objective for REDI II is to “enhance access to markets and to climate resilient approaches for targeted beneficiaries.” The project is structured in the following components:

Component 1. Climate Resilient Agricultural and Community Tourism Investments for Rural Enterprises: The objective of this component is to promote the development of micro, small and medium agricultural/community tourism enterprises that are better integrated into productive partnerships or “alliances” with other stakeholders along their respective value chain, through reliable linkages with buyers and markets and increased capacity to manage climate risks.

Component 2. Institutional Strengthening and Capacity Building for Public Entities: This component aims to strengthen the capacity of relevant public sector institutions – the Ministry of Agriculture and Fisheries (MOAF), Ministry of Tourism (MOT), and JSIF-and associated entities (Rural Agricultural Development Authority (RADA), Tourism Product Development Company (TPDCo), the Jamaica Tourist Board (JT) among others to provide the public infrastructure and quality services needed to promote inclusive rural development (based on the agriculture and tourism nexus) and to ensure the sustainability of the rural enterprises and productive partnerships supported by the project. This component has two subcomponents.

In an effort to strengthen the institutional capacity to continue to enhance the development of community tourism given that business will have to be conducted in the context of the existence of the COVID-19 pandemic, it has been determined that a market demand study to establish the demand for Jamaica’s Community Tourism product is timely. This is in order to assess its effectiveness, identify challenges in implementation, successes and lessons learned, with a view to sustaining growth of this sub-sector.

3. OVERVIEW OF THE CONSULTANCY

Prior to the outbreak of COVID-19, the service sector, of which, tourism is by far the largest component, accounted for about 75% of GDP. Jamaica has traditionally focused on the ‘Sun, Sea and Sand’ market which involves tourism hubs and all-inclusive beach resorts on the north coast however, growth is slowing in this area (2-3% per year in the Caribbean). The tourism market that was growing by 15-20% per year, prior to the pandemic includes nature, culture and experiential-based travel experiences that can be provided by community-based tourism enterprises (CTEs) located in rural areas. Preliminary research by a number of organizations suggests that the market for these products may substantially increase once travel resumes. Domestic tourism has also increased opportunities for community-based tourism. Understanding the changing market for community -based tourism is essential to effective product development. However, CTEs are still in their nascent stage and many require significant ongoing support to be developed and promoted by the Government of Jamaica (GOJ). If this segment is successful, there are also linkages and synergies between the tourism and agricultural sectors that could provide opportunities for rural development, including agro-tourism in selected rural areas.

An important consideration of the Government of Jamaica in the support of Community Tourism, is the retention of the tourist dollar in rural communities. Before COVID-19,

government statistics estimated that about 30 % of every tourist dollar is retained in the tourist sector, whereas its target is for at least 50%. However, retention in the rural communities served by Community Tourism is close to 100% as the small bed and breakfasts and restaurants are locally owned, the food is provided by local farmers and fisher folk, prepared by local cooks and chefs; transportation is owned and provided by local residents, attractions and experiences emanate from the local geography and culture; and support staff such as life guards and tour guides also come from the local communities.

A revision of Jamaica's 2015 National Community Tourism Policy and Strategy is expected to be conducted concurrently with this consultancy and it is expected that there will be interface between the two consultancies to ensure that marketplace harmony is obtained between the Policy and the Community Tourism marketing approach.

4. CONTEXT

The Jamaica Tourist Board (JTB) is the National Tourism Agency of Jamaica charged with the marketing of the island as a tourist destination. The JTB uses its international network of offices, interfaces with tour operators and other international partners, while locally working with stakeholders to ensure that the destination offerings are of the highest quality, representative of Jamaica and its peoples, and competitively placed in the market.

With the expected growth in community tourism enterprises (CTEs) arising from the Rural Enterprise Development Initiative I (REDI), REDI II and other initiatives, a demand study will assist the JTB to apply a more data-driven approach to its marketing of these CTEs.

The JTB's Strategic Objectives for the period 2019 – 2022 have been created to ensure that the organization maintains its relevancy and Destination Jamaica remains competitive in the tourism marketplace. The four specific objectives are:

- 1) Market Diversity and Expansion
- 2) Visitor & Stakeholder Centricity
- 3) Innovation and Digital Optimization
- 4) Operational Efficiency & Effectiveness

The demand study will allow the JTB to achieve these objectives as the information gleaned will provide empirical data on how CTEs can help to diversify the offerings of the destination; provide clues on how visitors and stakeholders can connect; open opportunities and/or identify areas for innovation; and help to increase the efficiency and effectiveness of the marketing efforts and the effective utilization of the organization's resources.

The demand study is expected to incorporate data from a review of three territorial studies – Latin America and the Caribbean, North America and Europe. These markets, cumulatively, represented over 90% of the visitors to the island in 2018.

The search for authentic and co-created experiences where visitors connect with locals has been identified among the growing opportunities in travel as well as investing more time in the search for travel experiences. Community tourism enterprises (CTEs) can help to provide more varied and inclusive experiences for guests to the island.

5. OBJECTIVES

The study's main objectives are therefore to:

1. Undertake a comprehensive analysis in three regions (North America, Europe and Latin America & The Caribbean) in order to identify the size, nature, and expectations of the market demand for community-based in the specified three markets/regions, in order to equip the JTB with specific research that can lead to greater planning and targeting of the markets that have a pre-disposition towards these experiences.
2. Create a profile of the visitor who has a proclivity to travel for community tourism experiences in order to increase the capacity of the JTB to identify decision triggers, travel patterns, or other psychographic characteristics that can assist in greater outreach to these visitors.
3. Identify gaps and opportunities for CTE product enhancement and new opportunities in line with market needs.
4. Strengthen the capacity of the JTB to deliver marketing messages in the appropriate format (traditionally and/or digitally) across the respective markets under study in order to develop marketing messages that can competitively place Jamaican CTEs on/in those three specific tourism regions and other international spaces.

6. SCOPE, TASKS AND DELIVERABLES

The study will build/enhance the capacity and efficiency of the JTB by providing research-based knowledge that will help to create more robust and targeted marketing programmes for community tourism enterprises. The study can be expected to be broken down into the following tasks and deliverables.

Task 1: Develop an Inception Report and Work Plan to meet deliverables under this consultancy, within the allotted resources and timeline, reflective of the expected objectives. It should therefore outline:

- i) A detailed description of the proposed methodology, literature review and any available data on community-based tourism markets. Globally, regionally and for Jamaica. Identify key competitor markets
- ii) Create a stakeholder map identifying key travel trade partners for the region and country, along with domestic travel providers for community-based tourism

iii) **Data Collection Plan:**

- o Develop a research plan with sample size, survey structure, and key research questions
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- o Develop Online survey/s for international and domestic travel trade and pilot with at least 5 stakeholders, adapt based on results. Launch survey.
- o Prepare outline for In person/virtual interviews with key players internationally in key markets and domestically, pilot with at least two players and adapt based on result
- o Consult with JTB Sales and Travel Partners
- o Identify key Channel dynamics (e.g. Cruise, Virtual platforms, Alternative channels, etc.)
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- o Develop and Monitoring and evaluation (ie. baseline data with indicators for the project)

iv) **Data Analysis Plan:**

Prepare plan for Aggregation, analysis and presentation of data (e.g., Excel, NVivo, SPSS, etc.)

- o Identify method for Comparative and competitor analysis with key competing destinations
- o Finalize monitoring and evaluation – presentation of baseline results and identification of goals
 - o Develop method for CTEs Fieldwork audit and assessment
 - o Case Management and Citizen Engagement: handling grievances or discontent against the actions executed/services provided by the staff involved in the information and/or data collection exercises

v) **Recommendations:**

A clear plan and recommendations should be offered for the following:

- Approach/system for consistent collection and dissemination of market information
- Summary of results from the online survey and follow-on interviews
- Identify products and services for which there is strong opportunity for increased consumption of locally produced goods and services in the local tourism sector

- Strategies to reduce specific constraints and limitations hindering tourism linkage with the domestic economy; and
- Improving the marketing and distribution of local goods and services to the tourism sector

Task 2: Based on the results of the online survey, assess the specific markets' propensity to purchase and utilize the products/services offered by the Jamaican community tourism enterprises (CTEs).

- Analysis of the identified three markets by conducting relevant research (focus groups, interviews, etc.) to determine the specific areas within the region that are best suited for this study
- Identify the specific areas within the regions which hold the best potential for Jamaica's Community Tourism Experiences
- Consult with the regional tour operators to determine their ability, experience and inclination to sell Jamaican Community Tourism Experiences and any feedback they have on product gaps and opportunities.

Task 3: Conduct necessary review and analysis to create a profile of the visitor in each of the identified regions who is best suited for community tourism messaging.

- Ascertain the demographic and psychographic profiles of the identified areas
- Identify the specific purchasing patterns that are congruent with this visitor profile
- Assess the expectations of those visitors for Community Tourism Experiences
- Assess the inclination of the visitor for established Community Tourism Experience themes – religion, gastronomy, culture, music & dance, wellness etc.
- Determine the appropriate nomenclature for Community Tourism Experiences and whether the term translates/connnotes/conveys a similar meaning across markets

Task 4: Identify opportunities to connect the identified traveller with Jamaica's CTEs

- Identify the particular tour operator entities within the markets that have the greatest ability to sell the Jamaican CTE experiences
- Recommend strengthening the capacity of the JTB to connect these tour operators to the CTEs as indicated
- Identify particular marketing channels to best reach the target segments
- Identify travel access points within the specific areas which hold the best potential for Community Experiences
- Identify and assess constraints that may hinder the JTB's ability to market the community experiences

Task 5: Conduct CTE audit and assessment. ability of existing CTEs to meet the basic needs of the international travellers from the three markets under consideration:

- i) Identification of the specific community tourism enterprises
- ii) Determine the specific entities and niche services/products, that are market ready
- iii) Review CTEs' management structure and service delivery capacity as it relates to the three markets under consideration
- iv) Estimation of the monetary value of leakages due to expenditure on imported goods and services
- iii) Identify thematic elements and platforms that can best place the CTE businesses in the competitive space
- iv) Identify appropriate marketing strategies for the specific markets and identified areas
- v) Create appropriate marketing training to help build resilient connections and opportunities

Task 6: In documentation of the findings, the team conducting the study will consult with the Jamaica Tourist Board and other relevant agencies and private sector partners. This collaboration will help to determine how to access the markets and sub-areas identified as holding the best potential for travel for community experiences.

Task 7: Development of draft and Final Report(s) with the findings by research stage. Within each region it is expected that each target area will yield its own visitor profile of persons who have an interest in community experiences broken down by demographic, psychographic, economic and other relevant characteristics. The final report(s) of the study shall include the following:

- 1) Executive Summary
- 2) Objectives of Study
- 3) Methodology
- 4) Visitor Profile by Region
- 5) Consultation Reports by Region
- 6) Key findings, recommendations, and justification by region
- 7) Other Appendices (including bibliography, working documents, interview lists, transcripts etc.)

Task 8: Conduct a series of training workshops with JTB and other relevant stakeholders to enhance the capacity to deliver on the results of this study.

Series of five (5) three (3) Day Training & Workshop Sessions

Will be conducted to gain knowledge and experience based on market demand study in the development of marketing strategies within the scope of community-based tourism

Attendees would include public sector and private sector

7. METHODOLOGY

This market study will involve a combination of desk research, document analysis, stakeholder consultation, surveys, interviews, focus groups and field work. Use of multiple data sources is encouraged including primary and secondary data obtained through interviews, questionnaires, surveys and focus groups.

8. PROCUREMENT SELECTION METHOD

The assignment is for a firm/team and the procurement selection method will be Consultant's Qualifications Based Selection (CQS). This method considers the quality of the proposal and the cost of the services in the selection of the successful firm.

9. QUALIFICATIONS AND REQUIREMENTS

Language: English (Oral and Written).

Requirements and Experience – Bidding Firm

The successful firm shall have a core mission as a research organization, specializing in market research. The firm must possess:

- Information gathering and analysis capabilities including a core team of key professional staff and the required software
- A minimum of five (5) years demonstrated competence in offering similar consultancies in this field by submitting list of clients and brief description of services provided
- A minimum of five (5) years' experience managing similar projects in developing countries (specifically in the Caribbean region)
- A minimum of five (5) years' experience preparing reports for multilateral agencies and/or government organizations
- Experience working with the tourism, agriculture, manufacturing, entertainment and digital sectors
- Demonstrated ability to adapt to virtual working arrangements if needed
- Experience working with rural communities and adult learners would be an asset
- Experience in Jamaica is a plus

Requirements and Experience – Key Professional Staff

- Firm shall provide CV's of the team members

- Key professional staff should be identified as listed below
- Firm should comprise the following key staff with the relevant expertise and qualifications:
- At least one team member must be resident in Jamaica

Team Leader/ Economist:

- Postgraduate degree in Tourism Management, Management Studies or a relevant social science
- Minimum five (5) years' research experience with emphasis on tourism policy and development as well as experience in statistical analysis using SPSS and Nvivo
- Thorough and current knowledge of Jamaica's tourism sector and tourism value chain analysis and development including in-depth understanding of procurement practices within the industry
- Minimum five 5 years' experience in project planning and management including the management of similar projects
- Proficiency in the use of Microsoft Office including PowerPoint, Excel, Word
- Strong written and oral communication skills and demonstrated ability of making effective presentations to diverse audiences
- Fluency in English (both written and oral)

Market Research Expert:

- Postgraduate degree in Marketing, Social Research, Statistics, Research Methods and Methodology or related field
- Minimum five (5) years' experience in market/economic research and statistical analysis, with particular emphasis in one or more of the following disciplines: tourism, manufacturing, entertainment and agriculture
- Minimum five (5) years' experience in the use of triangulation methodologies and conducting qualitative or quantitative surveys (field, interview or focus group assessments)
- Expertise in the use of statistical software and electronic data analysis tools namely SPSS and Nvivo
- Proficiency in the use of Microsoft Office including PowerPoint, Excel, Word • Strong written and oral communication skills and demonstrated ability of making effective presentations to diverse audiences
- Fluency in English (both written and oral)

10. REPORTING REQUIREMENTS AND TIME SCHEDULE FOR DELIVERABLES

The Jamaica Social Investment Fund will have contractual responsibility for the consultancy and in collaboration with the Destination Marketing Manager of the Jamaica Tourist Board will have management and technical oversight for the project deliverables over the duration of the contract. The World Bank REDI II team will also provide high-level technical inputs to the project. A policy coordinating committee, consisting of public, and private sector stakeholders has been established by the Ministry of Tourism and may be referred to for input. Final approval and acceptance of all deliverables lies with the Jamaica Tourist Board.

- 1) The deliverables, reports and other works of the consultant for this assignment shall be the property of the Government of Jamaica. The consultant should keep all work and services carried out for this assignment entirely confidential and shall not use, publish or make known without written approval of the Jamaica Tourist Board and/or the Jamaica Social Investment Fund. The Jamaica Tourist Board may share with the consultant data resulting from the other ongoing technical studies to inform the consultancy process.
- 2) All final deliverables should be submitted in an agreed electronic format to the Jamaica Social Investment Fund and the Jamaica Tourist Board by the dates indicated in the approved Work Plan.
- 3) The consultant should seek ongoing dialogue and discussion with primary stakeholders and maintain records of all meetings and interviews for dissemination to the Jamaica Tourist Board and the Jamaica Social Investment Fund. The consultant will seek ongoing dialogue with the Jamaica Tourist Board and the Jamaica Social Investment Fund throughout the consultancy process.
- 4) Prior to the start of this assignment, there will be an initial briefing with the Destination Marketing Manager of the Jamaica Tourist Board, the REDI II Project Manager and JSIF's Tourism Specialist. The objective of this meeting is to review the TOR and establish a common understanding about the contract's objective. Among the topics for this meeting will be the goals and expectations for the work, a preliminary discussion of the proposed methodology, review of the project schedule, and administrative details related to reports and on-going communication. Subsequent to the meeting the Consultant is expected to complete the Inception Report.
- 5) The Consultant is reminded that the Firm should request problem-solving meetings as soon as there are any indications of a variation in the scope of work, changes to the timeline or additional costs being necessary. No variations are to be made to the agreed activities, time or cost without the prior written approval of the REDI II Project Manager and the Destination Marketing Manager, Jamaica Tourist Board.
- 6) While undertaking the assignment the Consultant must ensure there are no conflicts of interest, give full disclosure of any issues, maintain fairness, ensure confidentiality while upholding all accepted professional protocols and practices. The Consultant should be able to work with persons no matter what culture, gender, religion, race, nationality, and age and have sensitivity and adaptability, treating all people without favouritism.

11. TIMELINE FOR CONSULTANCY

This consultancy is proposed to be carried out within six (6) months of contract signing.

12. CONSULTANCY DELIVERABLES

- Transcripts and audio recordings must include the location, date, name of the facilitator and participant/groups
- Primary data sets through quantitative SPSS software, Excel templates and qualitative software (NVivo or approved alternate software) are to be submitted.

13. GUIDELINES FOR PRESENTATION OF RESULTS AND REPORTS

Statistical reports provide a way to present statistical data and analyses in a document that can be easily understood and relied on for planning and decision-making. These reports sometimes contain data that readers are often unfamiliar with. Therefore, the statistical report should provide a brief description of the data and the setting in which the data were collected.

The description of the data must be written in a non-technical language that can be read and understood by non-statisticians. If sophisticated methodologies and statistical procedures are used, these must be clearly described. Further, where applicable, the report should contain a description of the problems or hypotheses to be addressed in the analysis. All relevant figures and numerical results from the analysis must be discussed with enough details and detected problems about the data. The method of analysis should also be discussed. Information presented must be unbiased and evidence based. The Firm will be guided by the following requirements:

Interpretation of Results

The interpretation of the results should include but not limited to:

- Estimation of the existing level of demand for local goods and services from the sectors of focus along with future forecasts up to 2030.
- Estimation of the potential demand for goods and services within the tourism sector
from the sectors of focus
- Identification of goods and services where there is strong opportunity for increased consumption by the tourism sector
- Description/explanation of the supply chain for goods and services used by the tourism sector, identifying weaknesses that pose a challenge to the efficient and cost-effective movement of goods and services from the producers and suppliers to the tourism buyers

- Identification of specific constraints and limitations hindering tourism linkage with the domestic economy
- Estimation of the monetary value of leakages due to expenditure on imported goods and services
- Assessment of the level of interest in using locally produced goods and services within the tourism sector

DELIVERABLES	Level of Effort (No. of Working Days)	Latest Submission Deadline - After Contract Signing	LINKED PAYMENTS
Presentation of Inception Report, Work Plan, Methodology and Survey Instruments (Electronic - to be a maximum of 25 pages, excluding annexes)	5	1 calendar month	20%
Submission and approval of Literature Review and Survey Instruments (Electronic - to be a maximum of 25 pages, excluding annexes)	10	2 calendar months	20%
Submission and approval of Draft Demand Study (Electronic - to be a maximum of 40 pages excluding annexes)	20	4 calendar months	30%
Submission and approval of Final Demand Study PowerPoint Presentation, of no more than 40 slides, to be presented to the JTB and stakeholders prior to submission of Final Report. (Electronic and 5 hard copies - to be a maximum of 60 pages each excluding annexes)	20	6 calendar months	30%
TOTAL	55	6 calendar months	100%

Payment and Conditions of Consultancy:

The consultancy services will be contracted for a lump-sum and will be paid as outlined above upon the satisfactory review and approval of all deliverables in keeping with the guidelines. The conditions of this consultancy will be regulated by and subject to the Laws of Jamaica, and by its related procurement policies.

14. EVALUATION CRITERIA

Expression of Interest

No.	Evaluation Criteria	Max Score
1	Qualifications and Competence	50
	Firm Experience (20): Core mission as a research organization specializing in market Research with 9-10 years' experience (20 points) Core mission as a research organization specializing in market Research with 6-8 years' experience (15 points) Core mission as a research organization specializing in market Research with 5 years' experience. (10 points) Below 5 years (N/A)	20
	9-10 years demonstrated competence offering similar consultancies specifically in the Caribbean region (20 points) . 6-8 years demonstrated competence offering similar consultancies specifically in the Caribbean region (15 points) . 3-5 years demonstrated competence offering similar consultancies specifically in the Caribbean region (10 points) . Below 5 years (N/A)	20
	9-10 years demonstrated experience working in tourism, agriculture, manufacturing, entertainment or the digital sector (10 points) . 6-8 years demonstrated experience working in tourism, agriculture, manufacturing, entertainment or the digital sector (7 points). 5 years demonstrated experience working in tourism, agriculture,	10

No.	Evaluation Criteria	Max Score
	manufacturing, entertainment or the digital sector (5 points). Below 5 years (N/A)	
2.	Experts 1 & 2	50
	Expert # 1/Team Lead (30 points): Postgraduate degree in Tourism Management, Management Studies or Equivalent Doctorate Degree (10 points) Masters' Degree (7 points)	10
	9-10 years' research experience with emphasis on tourism policy experience in statistical analysing SPSS & NVivo in countries of similar governance and development ecosystems. (10 points) 6-8 years' research experience with emphasis on tourism policy experience in statistical analysing SPSS & Nvivo, in countries of similar governance and development ecosystems. (5 points) 5 years' research experience with emphasis on tourism policy experience in statistical analysing SPSS & Nvivo, in countries of similar governance and development ecosystems. (3 points)	10
	Demonstrated knowledge and understanding of institutional and policy context in Jamaica and the region, pertaining to tourism development. Testimonials from completed assignments in all key areas above citing research and data analysis track record working with persons across diverse social and educational spectrums.	10
	Expert # 2 (20 points): Post-Graduate Degree in Marketing, Social Research, Statistics, Research Methods and Methodology or related fields. Doctorate Degree (10 points) Masters' Degree (7 points)	10
	9-10 years market/economic research and statistical research with demonstrated expertise in the use of statistical software and electronic data	10

No.	Evaluation Criteria	Max Score
	<p>analysis tools, specifically SPSS and NVivo. (10 points)</p> <p>6-8 years market/economic research and statistical research with demonstrated expertise in the use of statistical software and electronic data analysis tools, specifically SPSS and NVivo. (5 points)</p> <p>5 years market/economic research and statistical research with demonstrated expertise in the use of statistical software and electronic data analysis tools, specifically SPSS and NVivo. (3 points)</p>	
<i>Top Selected Firm from REOI</i>		
	Technical approach and methodology to execute the scope of work.	50
	Ability to execute the service required in a value-oriented manner in the time recommended, evidenced by a clear work plan and staffing arrangements.	50
	<i>SUBTOTAL</i>	100
	Total Score	100
	Minimum Score	70