



Request for Proposals (RFP)

Impact Assessment of COVID-19 on Ontario's Indigenous Tourism Industry

Deadline for Submissions: Friday, April 30, 2021

Proposals are to be submitted to:

Leni Brem, Director of Operations at Indigenous Tourism Ontario

lbrem@indigenoustourismontario.ca

Project Background & Purpose

The Indigenous Tourism Association of Ontario (ITO) is seeking qualified firms to conduct an economic impact assessment of the effects of the COVID-19 pandemic on Indigenous tourism businesses and operations throughout the province of Ontario. The purpose of this project is to acquire a clear picture and understanding of the scale and gravity of the impacts that the pandemic has had and will continue to have on Ontario's Indigenous tourism industry. The goal is to generate corroborative evidence of the disproportional effects that the pandemic has had on this niche sector in order to align strategies and take action to support the industry in the most proactive and effective way possible.

About ITO

ITO is the province's first and only dedicated Indigenous tourism organization that focuses on uniting communities, Indigenous organizations, and industry leaders to support the growth of Indigenous tourism in Ontario. ITO is a member-based organization and provides access to invaluable marketing, sales, and business development programs that build capacity to produce high quality Indigenous tourism products and services. ITO engages with Indigenous owned and operated businesses at all levels of market-readiness and places special emphasis on contributors to the industry at the grassroots level, which may include traditional Knowledge Keepers, land-based guides, cultural artisans and makers, cultural performers, chefs and culinary artists, cultural entrepreneurs, and more. Success at ITO is guided by the positive impact on our people, environment, and economy.

Indigenous Tourism in Ontario

Before the pandemic hit, Indigenous tourism in Ontario outpaced the growth of that of the tourism industry overall. In the 2018 Conference Board of Canada report on the national Indigenous tourism sector, it was noted that direct employment in Indigenous tourism significantly outpaced that experienced by general tourism activity in Canada. It was also found that the growth in direct GDP and revenues attributed to the Indigenous tourism sector significantly outpaced that of overall tourism in Canada. Ontario is home to the largest Indigenous tourism industry in Canada and plays a significant role in the industry's collective success. Prior to COVID-19, Indigenous tourism in Ontario contributed \$622 M to Canada's GDP (equal to 33% of the total from all provinces and territories), while supporting 12,924 jobs in 558 Indigenous tourism businesses. Reasons for the industry's growth vary, however an increasing desire to learn about Indigenous cultures, engage in intimate and meaningful experiences, disconnect from the stresses of everyday life, and reconnect with nature are some of prominent visitor trends that have emerged, all of which complement the changing face of the tourism landscape in response to COVID-19. This project will require the knowledge and consideration of the current realities facing Indigenous tourism businesses in the wake of closures and travel restrictions due to COVID-19. Although the situation evolves daily, Ontario is one of the provinces most impacted by permanent business closures, substantial revenue declines, and employment declines within the sector.

Project Scope & Deliverables

The chosen firm will be responsible for developing an economic assessment model and conducting a thorough analysis of the current state of the Indigenous tourism sector in Ontario. It is anticipated that the impact assessment methodology will require primary and secondary research, generating both quantitative and qualitative data.

Baseline Research

In commencing the project, the successful proponent will update and clearly identify baselines within Ontario's Indigenous tourism sector just prior to the onset of COVID-19 including but not limited to:

- A synopsis of key industry/business/operator characteristics
- Business operational structures
- Direct GDP contribution
- Tax revenues
- Direct and indirect job contribution
- Sub-sectors within the provincial industry (e.g., accommodation, outdoor tours, etc.)
- Insights and data relating to community-based grassroots contributors who may often not be included in the formal economy
- Impact that Indigenous tourism businesses have on the communities in which they are located

These findings will benefit from and be built upon by previous studies that have been conducted, for example the Indigenous Tourism Association of Canada's 2019 Report entitled *Canada's Indigenous Tourism Sector: Insights and Economic Impacts*. The successful proponent of this project will be responsible for reviewing, incorporating, and updating as required previous material and databases developed by ITO pertaining to Indigenous tourism businesses in Ontario.

COVID-19 Impact Assessment

The data produced and model adopted during the establishment of baselines will be used to guide the COVID-19 impact assessment of the industry, taking into consideration the same qualifying factors noted above as well as adding new ones. Substantial quantitative data surrounding the impact on Indigenous tourism businesses will be produced, covering at a minimum the following categories:

- Amount of lost revenue
- Impact on employment
- Number of business closures
- Impact on GDP contribution
- Anticipated future revenue loss, employment loss, and business closures
- Decrease in clients and/or bookings
- Impact on local economies
- Forecast of Indigenous tourism employment and revenues for the coming years
- Comparisons to other provincial jurisdictions

In addition to obtaining a wide sample of quantitative figures defining the economic impact on the provincial Indigenous tourism industry, the successful proponent is also expected to engage directly with operators to gain an intimate understanding of the situation and challenges faced, generating valuable qualitative data. This may include and is not limited to:

- Initial responses and business adaptations to the pandemic
- Perceived medium and long-term impacts on their business
- Adjustments to staffing, hours, and organizational structure
- Resources incurred in an effort to meet public health regulations
- Understanding of, availability, and sufficiency of financial and other support mechanisms
- Any opportunities that have arisen due to the pandemic
- General sentiments towards the future of their business and the Indigenous tourism sector
- Needs they have as a recovering business including training

In addition to the abovementioned items, the analyst is expected to provide a commentary surrounding the social and cultural impacts that COVID-19 has had on Indigenous tourism businesses, operators, communities, and the provincial industry.

In order to inform and enhance project research and findings, the proponent will be expected to extrapolate relevant data from ITO's existing programs relating to the impact of COVID-19 on Indigenous tourism businesses, in particular the past Business Support Broker (BSB) program as well as the current Indigenous Business Advisor (IBA) program. The proponent will be expected to liaise as required with the IBA project team to ensure a unified and coordinated approach to helping the industry recover based on evidence.

Upon the collection and analysis of all research, the successful proponent is expected to compile the information into a report which includes and is not limited to key findings, figures, and conclusions. Findings should be presented and organized according to differing categories such as location/region, business size, sub-sectors, etc. In addition, the proponent is encouraged to incorporate projections and trends that may further impact the future of the Indigenous tourism industry in Ontario.

To kick off the project, the chosen company will work with the ITO project team to determine the final project methodology, work plan, deliverables, and timeline. Although not limited to, the following activities must be included and/or considered in the project work plan:

- Direct tourism and business operator engagement including assessment of business continuity and current financial implications
- Inclusion and provision of provincial and federal industry research detailing the economic impacts of COVID-19
- Identify baselines to build an economic assessment model and projections that are based on the qualitative and quantitative data collection of key findings
- Assemble a dataset of the collected information to be analyzed and an overview of the collection and validation approach
- Provide a model to quantify the economic impact
- Identify incremental measurements for success based on key performance indicators
- Review and familiarize with ITO's past work and current initiatives including the IBA Program, COVID-19 reports and strategies as well as the prior BSB Program
- Ensure sensitivity to over-consultation and identify strategic collaborations for gaining information without being overbearing towards the industry during a crisis
- Consider trends that characterize the new tourism economy and those that will be relevant post-COVID-19 including domestic markets as well as labour and employer needs and priorities
- Include the use of 3rd party applications such as [MobileScapes](#) and [Impact Calculator](#) to understand the state and characteristics of Ontario's Indigenous tourism market
- Engage ITO throughout the process, obtaining approval at key milestones and provide a draft report prior to finalization

Project Budget & Timeline

All proposal submissions must be received by no later than 4pm EDT on April 30, 2021 and the successful recipient will be notified by no later than May 14, 2021.

It is anticipated that work will commence by May 26, 2021. All work associated with this project and subsequent reporting must be completed by no later than October 30, 2021.

Proponent Qualifications & Evaluation Criteria

Desired Qualifications

The chosen proponent will have substantial experience in the development of social and economic impact assessments particularly for tourism and preferably Indigenous cultural industries. The successful candidate should meet at a minimum the following criteria:

- Comprehensive knowledge and experience with current economic research and analysis methodologies
- Experience conducting COVID-19 impact assessments
- Creativity, innovation, and adaptability to complete the project's deliverables
- Understanding and consideration of Indigenous research methodologies, philosophies, and worldviews as well as social considerations
- Familiarity with the Indigenous tourism industry in Canada, particularly Ontario

Evaluation Criteria

Proposals are to include information pertaining to each of these categories listed and will be assessed based on the following weighted evaluation criteria:

1. Firm Qualifications & Project Team	30%
2. Research Methodology & Project Workplan	40%
3. Budget & Schedule	10%
4. Past Experience & References	20%

Proposal Requirements

Proposals are to be submitted via email to Leni Brem, Director of Operations at Indigenous Tourism Ontario at lbrem@indigenoustourismontario.ca. Responses must be submitted via email in PDF format.

In order to be considered, proponents must submit a complete proposal on or before the deadline, including the following to a maximum of 5 pages.

- Cover Letter indicating how the firm endeavours to make this project special
- An explanation of how the responding firm will engage Indigenous advisors and Indigenous content in conducting the work requested
- Firm qualifications and project team
- Research methodology, economic assessment model/approach and measurement tactics
- Detailed workplan and project deliverables
- A clear and detailed project budget (including travel) and timeline
- Past experience and references (including examples working with Indigenous businesses and organizations)