NATIONAL ABORIGINAL TOURISM RESEARCH PROJECT 2015

Economic Impact of Aboriginal Tourism in Canada

April 2015

ABORIGINAL
TOURISM ASSOCIATION OF CANADA

ASSOCIATION TOURISTIQUE
AUTOCHTONE
DU CANADA

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About ATAC

ATAC was borne from industry leaders that were involved with Aboriginal Tourism Team Canada (ATTC). First, ATAC operated as an informal group under the name the Aboriginal Tourism Marketing Circle (ATMC), then in summer 2014, formerly established as Aboriginal Tourism Association of Canada. Over 20 Aboriginal tourism industry organizations and government representatives from across Canada are party to ATAC by signatory to a 2002 Memorandum of Understanding (MOU). Through a unified Aboriginal tourism industry voice, ATAC focuses on creating partnerships between associations, organizations, government departments and industry leaders from across Canada to support the growth of Aboriginal tourism in Canada.

The Advisory Committee

Great Appreciation to the project Advisory Committee members:

Keith Henry, Aboriginal Tourism Assn of BC (AtBC) (Chair)

Carole Bellefleur, Tourisme Autochtone Québec

Patricia Dunnet, Metepenagiag Heritage Park

Trina, Mather-Simard, Aboriginal Experiences

Jeff Provost, Eastside Aboriginal Sustainable Tourism Inc.

Dana Soonias, Wanuskewin Heritage Park

Special Thanks

Much appreciation and thanks to the project funder – Aboriginal Affairs and Northern Development Canada.

The Project Team

The project team was led by O'Neil Marketing & Consulting, a fully owned Aboriginal consulting business. The principle, Beverley O'Neil is a citizen of the Ktunaxa Nation and has more than 25 years in Aboriginal community economic development, tourism and research. The project team consisted of Beverley O'Neil (Contract/Lead), Dr. Peter Williams, Krista Williams, Dr. Roslyn Kunin, Lee Gan, and Brian Payer. Dr. Peter Williams has authored research papers worldwide on tourism; while R. Kunin & Associates, Inc., is a leader in forecasting economic impact of tourism, First Nations businesses, and major international events.

ABORIGINAL TOURISM ASSOCIATION OF CANADA (ATAC)

NATIONAL ABORIGINAL TOURISM RESEARCH 2015:

Economic Impact of Aboriginal Tourism in Canada

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EXECUTIVE SUMMARY

BACKGROUND

It has been more than a decade since the last national study of Canada's Aboriginal tourism industry was conducted. The *National Study of the Aboriginal Tourism Industry in Canada* documented that Aboriginal tourism was a larger economic generator than anticipated. The study found that in 2001:

- Aboriginal tourism generated $4.9 billion in Canada (including casino revenues);
- More than half (59%) of the total was from tourism expenditures;
- The direct contribution to the GDP from Aboriginal tourism businesses' was $290 million which increased significantly when casinos were included ($596 million);
- There was an estimated 13,000 full-time equivalent jobs attributed to Aboriginal tourism; and
- There was growing interest in the Aboriginal tourism experience, creating opportunities for food and beverages, accommodations, outdoor activities, cultural and interpretive centers.

More than 10 years later, there have been many changes in Aboriginal/Indigenous tourism in Canada. Many of the regional Aboriginal tourism organizations closed that supported and promoted provincial/territorial Aboriginal tourism and collaborated on a national level with Aboriginal Tourism Team Canada (ATTC). ATTC also disbanded. Despite these events industry leaders continued to move the Aboriginal tourism development and marketing forward as the national Aboriginal Tourism Marketing Circle (ATMC). ATMC is now a new national organization called the Aboriginal Tourism Association of Canada (ATAC). ATAC has continued where the ATTC and ATMC left off – continuing the coordination and advocacy of Aboriginal tourism development across Canada.

Accordingly, there is a need to understand the state of Aboriginal tourism, understand the economic impact and determine its global competitiveness. ATAC commissioned this national research project to:

1) Develop a current profile of the Aboriginal tourism industry in Canada in a determination of whether there has been progress since 2002;
2) Understand tourism industry trends, especially how they pertain to Aboriginal/Indigenous tourism, and identify opportunities and challenges associated with these trends; and

3) Ascertain the direction and needs of Canada's Aboriginal tourism industry to move forward.

To fulfill these objectives primary research was conducted with businesses and individuals across the country and included:

- An **inventory of Aboriginal tourism businesses** in Canada. The business inventory results were combined with Statistics Canada economic impact multipliers to estimate total economic impact of Aboriginal tourism businesses in Canada.
- An **online survey of Aboriginal tourism businesses**. The online survey was used to understand business characteristics and growth prospects and challenges.
- An **online survey of Canada's key travel trade**. Travel trade insights helped to understand the extent of inclusion of Aboriginal tourism, demand and competitiveness.
- **Interviews with leaders** of Aboriginal Tourism Associations and in key government and provincial destination marketing organizations assessed barriers and opportunities for growth.
- **Case studies** of successful Aboriginal tourism organizations helped to profile tips and tricks to success.

Also, secondary, industry research documented and summarized:

- The state of the global tourism industry,
- Key trends in the Canadian tourism industry,
- Aboriginal/Indigenous tourism trends from both the supply (business) side, and the demand (consumer) side.
- Canada's competition when attraction visitors interested in Aboriginal tourism, and
- Relevant regional (provincial/territorial) Aboriginal research.

DEFINITION

This study focuses on Aboriginal owned and / or controlled tourism experiences, and includes relevant Aboriginal-themed experiences that are government/public owned. ATAC has generally defined Aboriginal tourism as:

Aboriginal Tourism – all tourism businesses majority owned, operated and / or controlled by First Nations, Métis or Inuit peoples that can demonstrate a connection and responsibility to the local Aboriginal community and traditional territory where the operation resides.

Aboriginal Cultural Tourism – meets the Aboriginal tourism criteria and in addition, a significant portion of the experience incorporates Aboriginal culture in a manner that is appropriate, respectful and true to the Aboriginal culture being portrayed. The authenticity is ensured through the active involvement of Aboriginal people in the development and delivery of the experience.

Aboriginal Cultural Experiences – offer the visitor a cultural experience in a manner that is appropriate, respectful and true to the Aboriginal culture being portrayed.

(SOURCE: ATAC National Authenticity and Market Readiness Standards Manual 2013)

While "Aboriginal tourism" is the common term used in Canada, in other parts of the world, the common term is "Indigenous tourism".

In addition, Canada has three recognized Aboriginal peoples – First Nations, Inuit and Métis. The term **First Nation** came into common usage in the 1970s to replace the word "Indian". It is often used to refer to the first peoples of Canada and refers to both Status (people of Indian origin entitled under the *Indian Act* of Canada to be registered as an "Indian") and non-Status people. The term "First Nation" is also used to replace the word "Band" in the name of the community. **Band** is a "body of Indians for whose collective use and benefit lands have been set apart or money is held by the Crown, or declared to be a Band for the purposes of the *Indian Act*."

During the study, it was apparent that not all provinces or territories operate with the same definition. Consequently, Aboriginal tourism characteristics were identified and used in order to collect consistent information across the country. This was necessary to develop a consistent inventory of Aboriginal tourism businesses that served as the basis for calculating the economic impacts.

PRIMARY RESEARCH

This section outlines results from the Aboriginal tourism business inventory, the economic impacts, the business survey, the travel trade survey and the in-depth case studies.

Aboriginal Tourism Business Inventory

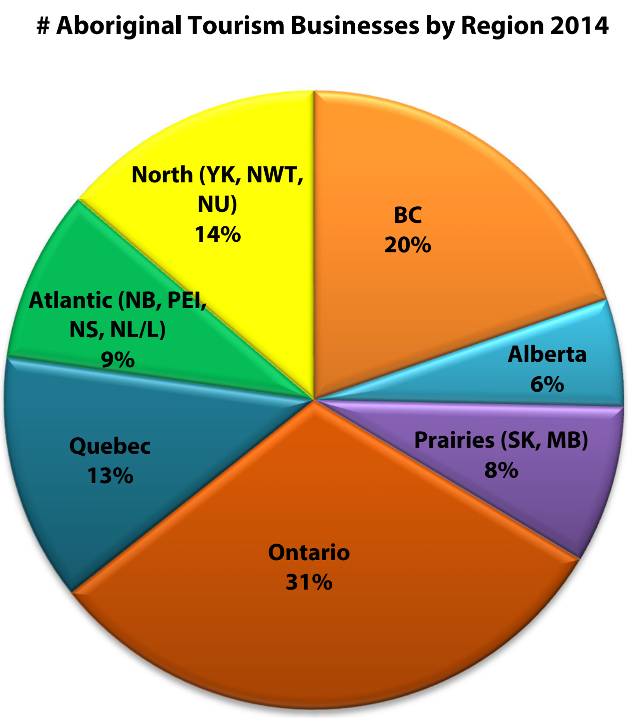
The Aboriginal tourism business inventory is based on information compiled from directories, lists, and websites generated through: ATAC regional members, Aboriginal Capital Corporations, Aboriginal export agencies, provincial and territorial travel organizations: internet searches of relevant First Nations and other on-line tourism related sources associated with Google, Facebook, and Trip Advisor.

To the extent identifiable, the inventory included businesses that were either partially (1-50%) or majority (51%+) owned by Aboriginals. Partially owned businesses were incorporated, however, data concerning the level of Aboriginal content was not available. The ATAC inventory also identified 170 other Aboriginal Themed ventures owned by government and / or other non-profit tourism business operations (e.g., typically museums, attractions and historical sites). Most of these businesses were located in Alberta (54), Manitoba (49), Saskatchewan (19), and Northwest Territories (18).

In total, over 1500 Aboriginal tourism experiences were identified across Canada.

- One-third of the Aboriginal tourism businesses identified are located in Ontario (469) followed by British Columbia with one-fifth (20%) and Quebec (13%) (Exhibit 6-3).
- The top three tourism sectors for Aboriginal tourism are: Outdoor Adventure (20.9%) which is one-fifth of the experiences, followed by Retail (19.7%) which includes art galleries, gift shops and gas stations (which serve visitor markets, not primarily locals), and Accommodations (17.5%).
- The universe of the number of Aboriginal tourism businesses has expanded from 892 in 2002 to more than 1,500 in 2014.

Exhibit 0-1: Aboriginal Tourism Businesses by Region



Economic Impacts

The inventory results were combined with results from the business survey and the provincial input-output model developed by Statistics Canada to assess the direct, indirect and induced impacts of Aboriginal tourism activities using common variables such as jobs, Gross Domestic Product (GDP), and government tax revenue.

It is estimated that Aboriginal tourism sector in Canada:

- Employs approximately 33,100 workers in all provinces and territories (but excluding Northwest Territories), equivalent to 2.0% of the total tourism sector employment in the country;
- Generates $2.65 billion of gross output in the economy, which is equivalent to about $1.4 billion of the country's GDP;
- Contributes over $870 million in employee wages and salaries, and
- All levels of governments benefit through almost $67 million of consumption tax revenue.

Aboriginal tourism sector in Canada…
33,100 workers employed
$2.65 billion of gross output
$1.4 billion GDP
$870 million in wages and salaries
$67 million of consumption tax revenue

Exhibit 0-2: Economic Impacts of Aboriginal Tourism in Canada

Variables	Direct Impact	Simple (Direct and Indirect) Impacts	Total (Direct, Indirect and Induced) Impacts
Employment (Full Time Equivalence)	26,797	35,063	40,180
Output	$2.65 billion	$3.77 billion	$4.64 billion
GDP (Value Added)	$1.41 billion	$2.04 billion	$2.58 billion
Wages and Salaries	$0.87 billion	$1.17 billion	$1.36 billion
Government Tax Revenue	$67.4 million	$101.7 million	$145 million

Note: Because of the inter-relationship amongst industries, it is possible to estimate the multiplier effects of such direct benefits for Aboriginal tourism. "Simple multipliers" capture the sum of direct and indirect effects. "Total multipliers" capture the sum of direct, indirect and induced effects

Over time, there has been growth in the economic impact of Aboriginal tourism.

- Direct employment of the Aboriginal tourism sector has increased. In 2002, there was an estimated 12,566 people employed (including employment in casinos). Today it is estimated to be three times larger at an estimated 33,100.
- Direct gross output from Aboriginal tourism businesses has increased. The growth is an estimated $0.37 billion at $2.65 billion in 2014, up from $2.28 billion in 2002.
- Direct GDP contribution from Aboriginal tourism sector has grown. The current study estimated the GDP at $1.4 billion, while it was estimated at $596 million in 2002. This difference may be attributed to the difference in the underlying industry distribution within the Aboriginal tourism sector between the two studies.

Aboriginal Tourism Business Survey Results

Overall, 132 Aboriginal tourism businesses responded to the online survey conducted in October and November, 2014. Key findings include:

- Ownership varied between businesses. About 83% of all businesses participating in the initial on-line survey were at least 51% owned by Aboriginals. The largest proportion of these businesses belonged to either individual Status Indians (29%) or single Community Bands (24%). Overall, the primary location of the Aboriginal owned businesses was almost evenly split between reserve (51%) and off-reserve (49%) sites.
- Businesses typically were involved in a variety of revenue generating activities. The largest shares of these ventures included a combination of general tourism services (77%) or attraction activities (73%).
- About 86% of businesses reported included Aboriginal cultural experiences in their product and service offerings. Those most frequently mentioned cultural elements included Aboriginal themed performances, displays and interpretive programming (72%), general cultural atmosphere (69%), information displays and tours (64%), and traditional events (55%). Overall, about 78% of the Aboriginal tourism businesses providing related cultural experiences reported that they had processes in place to ensure the cultural integrity of their offerings.
- Aboriginal tourism businesses employed several approaches to advance their market-readiness. Most frequent practices (70%+) included building their capacity to host tour groups, obtaining adequate visitor liability insurance; and installing systems to respond to travel trade requests and booking processes in a timely manner.
- Marketing communication tools predominantly included: traditional print brochure materials (84%), on-line social media (60%), as well as radio/TV and newspaper advertising (57%). Amongst those using social media, the most frequently mentioned communication tools were Facebook (96%), Twitter (42%), and YouTube (37%).
- Overall, about half (48%) of businesses were able to comply with most travel trade requests within 24-hours. Response times were generally faster on week-days during peak season, as opposed to other times of the week and year.
- While the source and number of Aboriginal tourism visitors varied considerably between businesses, on average the largest share of visitors (~55%) were derived from relatively localized provincial /territorial sources, and about 22% came from other parts of Canada. International visitation was largely attracted from primarily United States and European markets.
- Visitor length of stay varied according to the type of Aboriginal tourism business. Overall, the largest proportion (54%) visited for 4 hours or less. Among those staying overnight, the average visit was for one night. The vast majority (82%) of businesses reported that 25% or less of their clients were gained from travel trade sources.
- Overall, the largest proportion (56%) of business had been operating for more than 12 years. However, about 28% had been in operation for 5 years or less. While 61% of the businesses reported operating year round, July and August were flagged by 75%+ of businesses as the best revenue producing months.

- On average, businesses employed about 8.07 full-time year round (i.e., full-time is working more than 20 hours per week) and another 7.48 full-time peak season employees. About half (53%, or 4.25 employees) of the full-time year round were Aboriginal while a higher proportion (70% or 5.25 full-time peak season employees) were Aboriginal.
- Full-time employees were complemented by additional part-time year round (i.e., part-time is working less than 20 hours per week) (7.87) and peak season (3.66) workers. About 17% or 1.35 of the part-time year round, and 86% or 3.13 of the part-time peak season were Aboriginal employees.
- Overall about two-thirds (67%) of businesses reported that their operations were managed or directed by Aboriginal personnel.
- Businesses reported relatively positive performances over the past three years. About 92% of the businesses indicated that over the past three years their revenues/sales had either remained the same or increased. Revenue per business aveed around $369,000 annually.
- Aboriginal tourism businesses were generally optimistic (87%) about growth prospects over the next 3 years. On a scale ranging from 1=very pessimistic to 4=very optimistic, businesses tallied an average rating of 3.36. They felt that such growth was most apt to be associated with visitation levels, revenues, and further cultural tourism experience development.
- More than half of the reporting businesses indicated that their business plans included greater investments in new or enhanced cultural experiences (71%), expanded infrastructure (58%), staff training (56%), and new amenities and services (55%).
- The most frequently cited constraints to growth were accessing adequate funding (39%), and finding and retaining qualified staff (31%).
- Development constraints were cited as also holding back business growth prospects. These were mainly related to a combination of transportation issues.

Travel Trade Survey Results

A total of 36 travel trade representatives provided their perspectives on Canada's Aboriginal tourism industry. Key results include:

- The travel trade representatives that responded to the online survey offered receptive (65%), inbound (54%), and incentive (35%) travel services. The extent of their activities varied by business, but collectively extended across Canada. However, most of the businesses had presence in Quebec (86%), British Columbia (81%), Ontario (79%) and Alberta (79%).
- The vast majority (89%) of them included Aboriginal culture content in their tour packages.
- For most (75%), Aboriginal tourism was positioned not as the primary focus, but rather as an important part of a broader multi-activity package experience. On average, they incorporated Aboriginal cultural tourism on 1.85 of the total tour package days. Overall, a median of one day of such content was included.
- Overall they ranked Canadian Aboriginal tourism development as being generally 'somewhat better' than global competition in this market niche. They were most apt to be impressed with the product

authenticity, customer service, and travel trade relations aspects of the Canadian Aboriginal tourism businesses.

- Travel trade representatives identified actions necessary to ensure continued competitiveness and growth for Aboriginal cultural tourism in Canada. Those factors most important were: increasing travel trade relationships; ensuring product market-readiness, and implementing authenticity practices.
- Travel trade operators were more optimistic about demand for Canadian Aboriginal cultural tourism experiences as opposed to more general global growth in this market niche. However, they felt that growth would be 'moderate' as opposed to 'dramatic' due to limited market awareness and promotion. In keeping with the preceding views, they were cautiously optimistic about the possibility that their companies would add more Aboriginal cultural content to their respective tour portfolio over the next five years.
- Companies that suggested they would add additional Aboriginal cultural aspects to their tour packages in the future indicated they would probably incorporate more attractions such as interpretive centres (76%), Aboriginal guided outdoor and adventure experiences (68%), and cultural tours (64%).
- 'Top of mind' priority actions to increase the competitiveness of Canadian Aboriginal cultural tourism included: ensuring the market and export readiness of existing products and services; increasing domestic and international market awareness of and exposure to existing Aboriginal cultural opportunities; and, escalating partnerships and programs with travel trade operators.

Interviews with Aboriginal Tourism, Government and Tourism Industry Leaders

In-depth interviews with all ATAC members, key government officials, and provincial and national Destination Marketing Organizations (DMO) research and product development professional across the country. In total, more than 60 interviews were conducted in summer and fall of 2014. Interviews focused on barriers and opportunities for growth.

Perhaps the greatest barrier in Aboriginal tourism development expressed is the absence of coordinated regional Aboriginal tourism initiatives, especially regional Aboriginal tourism organizations. Further, the level of support for Aboriginal tourism operators by those Aboriginal tourism organizations also varied. Other common barriers were, absence of product development of Aboriginal tourism operators and services to support them, low market-readiness of Aboriginal tourism operators and insufficient partnerships, industry knowledge and linkages. These are summarized in Exhibit 0-3.

While there are barriers to development, conversely there are opportunities.

- Improve competitiveness through enhanced business development, such as enhancing market and export readiness through improved product quality experiences.
- Develop partnerships with mainstream tourism businesses/associations and develop a network of Aboriginal tourism businesses.
- Offer training and development programs for the Aboriginal tourism workforce, including customer service, industry knowledge, cultural protocols, and leadership and business management.
- Increase presence at transportation gateways, such as airports and major roads.

- Improve Aboriginal tourism experiences to fulfill consumer demand. This can be through enhanced product development, by increasing the offering of authentic cultural experiences that involve learning, are experiential, and promote visitor immersion and engagement.
- Enhance livelihood for Aboriginal tourism businesses and local tourism economies by building support from local communities, and establishing strong Aboriginal tourism industry associations supported with resources for operating, product development, marketing and execution.
- Increase demand for Aboriginal tourism experiences through marketing activities that raise awareness of Canada's Aboriginal tourism experiences.

Exhibit 0-3: Aboriginal Tourism Barriers to Growth

Barriers to Growth	Aboriginal Tourism Professionals	Key Government Informants	DMO Professionals
Lack of Organization/Coordinated Approach			
Inconsistent definition across country	✓		
Unclear ATAC mandate	✓		✓
No strategy for growth	✓	✓	
Lack of support for new businesses or associations	✓	✓	✓
Lack of linkages with the tourism industry	✓	✓	✓
Overall Lack of Market/Export Readiness	✓	✓	✓
Availability of Qualified Workforce (e.g., training, business leaders)	✓		✓
Availability of Recent Research			
Lack of supply-side research w/out organization (e.g., business lists)	✓		✓
Availability of recent market research	✓		✓
Competition with Other Industries			
Workforce goes where they can earn the most money	✓	✓	✓
More government support for other industries	✓	✓	✓
Industry Infrastructure			
Expensive air transportation	✓		
Expensive insurance	✓		✓
Poor roads/signage to businesses	✓		✓
Community Support			
Unclear cultural protocols			✓
Lack of community infrastructure – roads, services, internet	✓	✓	
Community leaders focused on other priorities (e.g., housing, sewer, water)			✓
Lack of support for successful businesses and entrepreneurs	✓		✓
First Nations Language Support (not English or French)	✓		
Availability of Aboriginal Tourism Product in Major Urban Areas			✓
Access to Business Capital	✓	✓	✓
Key Visitor Market Perceptions of Injustice Against Aboriginal People (e.g., land claims, missing women)			✓

CASE STUDIES IN ABORIGINAL TOURISM

Across Canada in the more the 1,500 Aboriginal tourism owned businesses where there are unlimited best practices and examples of how to start up and operate a successful, respectful cultural tourism experience. For this study, we selected four experiences, one from each region in Canada (west, central, east/Maritimes, and north), that reflected different types of Aboriginal tourism development (community planning, outdoor adventure, food and beverage/retail/arts and crafts, attractions) and Aboriginal ownership (community and individual/private).

The case studies selected feature established Aboriginal and First Nation driven tourism experiences that feature essential elements to operating successful Aboriginal tourism experiences.

- **Carcross-Taglish First Nation** in Yukon is a First Nation whose community economic development activities underscore tourism and youth engagement and their connection to the land and culture.
- **B Dene Adventures** owner Bobby Drygeese shows how his long-time dream of operating a fishing camp teaching traditional Dene ways.
- **Steeve Gros-Louis is** an entrepreneur owning five operations in Wendake, Quebec, the heartbeat of the Huron Nation. In these ventures he practices cultural teachings in planning and ensures operations, while creating employment for community members and promoting cultural preservation in many business practices.
- **Atlantic Canada** has three heritage centres that are focal points to the development of tourism creating business and employment opportunities.

The following table summarizes tips to success of these experiences.

Exhibit 0-4: Tips to Success

Tips to Success

1. Develop business operating skills, especially how to manage finances.
2. Plan for the future, understand tourism impacts on the community and culture, engage the community in planning and operations.
3. Exercise leadership and vision – getting involved with tourism organizations and groups, sharing your knowledge, ideas and skills.
4. Know your strengths, and shortfalls. Shortfalls can be minimized through planning and working with others.
5. Involve your community. They can be help in planning, ideas, and employment.
6. Partner and connect with the tourism industry through networking events, committees, boards, memberships, and working together.
7. Understand that tourism is stronger when everyone works together – visitors buy a destination, not often a single business.

8. Operate with consistent cultural values and principles, such as fairness, consistency, respect, and conservation.
9. Take pride in and respect for culture, history, heritage and traditional ways.
10. Know tourism market-readiness standards, and implementing them into business operations and pricing.

SECONDARY/INDUSTRY TOURISM TRENDS

The Global Tourism Industry

While much of what shapes Aboriginal tourism development in Canada is based in Canada, what is going on globally strongly influences visitor travels, tourism development and planning.

Tourism is a cornerstone of the global economy that has grown from 529 million tourist arrivals in 1995 to over 1 billion in 2013. In fact, the United Nations World Tourism Organization (UNWTO) forecasts that global international tourist arrivals will reach 1.8 billion in 2030 (3.3% annual growth rate). It is expected that growth from emerging economies will surpass growth from established economies such as Western Europe and North America.

Canada has experienced solid growth in the economic performance of the tourism industry over the past decade including:

- 618,000 jobs in Canada and over 170,000 tourism business establishments in 2013;
- International tourism revenues that accounted for $16.4 billion in 2013; and
- In 2012, Canadian tourism GDP of $32.3 billion which was an increase of 4% from 2011 and 13% from 2007.

However, on the international side, Canada has experienced declines in international overnight trips to Canada due to global events including a stronger Canadian dollar, the severe acute respiratory syndrome (SARS) epidemic and the 2008/09 economic downturn. Recently, this trend was reversed with overnight international visitor arrivals up 1.5% to 16.6 million from 2012. Notably 72% of those were from the United States. Other core international markets were the United Kingdom, Germany and Australia, as well as a several emerging markets including China which experienced exceptional growth of 22% in 2013.

Domestically, Canadians made 110.5 million trips in 2013 which was up marginally from 2012; however, domestic travel expenditures decreased by 4% from 2012, but were up by 1% from 2011.

Canada has not kept pace with its international competitors. Canada lost market share from a high of 2.8% in 2000 to 1.5% in 2013. Further, although Canada remains among the top 20 of most visited countries in terms of international visitor arrivals, it has slipped from 8th place in 2000 to 17th in 2013. On the positive, these declines were off-set by growth in domestic tourism resulting in an increased dependency on domestic travelers.

Provincially, Ontario has the highest share of both domestic trips and international visitors. Behind Ontario, Quebec ranked second for domestic trips while British Columbia ranked second for international visitors. The high number of visitor arrivals to British Columbia and Ontario is due primarily to the large number of flights arriving at gateway airports in these provinces.

The characteristics of these key visitor markets to Canada, domestic and international are listed below. Market size and potential number of travelers for Canada are based on Canada Tourism Commission (CTC) estimated of 2013.

Emerging Markets

Emerging markets are of interest to Aboriginal tourism and Canada's larger tourism industry. These markets present opportunities for Aboriginal tourism.

- The UNWTO forecasts that most outbound tourism growth will occur from emerging economies.
- The most promising of these include Brazil, Russia, India and China with forecasts from UNWTO that project outbound tourism growth rates to exceed 4%.
- The CTC identified Japan, South Korea, Mexico, Brazil, China, and India as emerging or transition markets.
- Year-to-date (2014), the number of overnight trips has demonstrated strong growth from Brazil, Japan and South Korea and remarkable growth from China and India.
- Although growing, the China market still represents just under 3% of all international overnight trips to Canada.

Exhibit 0-5: Top Visitor Market Characteristics to Canada

Market	Market Characteristics	Avg. Trip Duration	Spending per Trip	% over 45 years old	Number of Male vs Female
Canada *Largest market in Canada*	85% of overnight visitations. 112.3 million trips within Canada resulting in $28 billion expenditures. $35.2 billion spent overnight outside of Canada. **Market Size:** 14.2 million	n/a	n/a	n/a	n/a
USA *Largest International market to Canada*	2nd highest international traveler behind China. **Market Size:** 63.3 million **Canadian Potential:** 33.6 million (53%)	4.3 nights	$533	60%	Equal
	Overseas Markets				
United Kingdom *Largest overseas market*	Significant declines in visitors to Canada attributed to United Kingdom economic crisis and slow recovery. **Market Size:** about 16.5 million **Canadian Potential:** 4.9 million	13.9 nights	$1,314	58%	Equal
France *Second largest overseas market*	Slight growth in overnight travelers from France since a small peak in 2010. 6th for international travelers (2013). **Market Size:** 13.6 million **Canadian Potential:** 5.8 million	16.7 nights	$1,256	45%	Equal
Germany *Third largest overseas market*	3rd in world for outbound travel. **Market Size:** 14.5 million **Canada's Potential:** 6.0 million	17.4 nights	$1,506	44%	Male 57% Female 44%
Australia *Fifth largest overseas market*	Strong economy and dollar have led to growth in outbound travel. 8th in international tourism expenditures (2013). **Market Size:** 6.5 million **Canada's Potential:** 2.4 million	15.6 nights	$1,791	About half	Male 45% Female 55%

Barriers to Canada's Visitor Market Growth

The CTC has examined why travelers choose not to visit Canada. The top markets revealed the reasons being: cost, other options for visitation, and no real reason to visit Canada as key factors.

These causes point towards opportunities to apply marketing dollars to …

> Persuade travelers that the outstanding experience is worth the expense, and that the time to visit is now, creating urgency.

Destination development barriers included:

- **Marketing** – the need for a strong national marketing campaign;
- **Access** – aviation costs and visitor documentation are some of the biggest barriers for travelers;
- **Product** – products such as parks, festivals and attractions should be the focus of investment priorities; and
- **People** – federal labor programs should reflect the unique nature of the industry.

To combat the barriers identified and to increase Canada's competitiveness and tourism market share, the CTC and Deloitte both agree that Canada must – reduce visa barriers, increase airline competitiveness, and increase demand for travel to Canada by increasing funds for marketing.

ABORIGINAL / INDIGENOUS TOURISM STRUCTURE AND TRENDS

Agencies Leading Aboriginal Tourism in Canada

Aboriginal tourism has been identified as an emerging sector in the tourism industry with great potential to help differentiate the Canadian and regional tourism industries. Accordingly, the tourism industry, governments and associations at all levels (federal, provincial and local) must develop and market Aboriginal tourism in Canada.

The existing organizations, associations and government departments that hold the responsibility for supporting Aboriginal tourism that can play a leading role are:

- The **Aboriginal Tourism Association of Canada** (ATAC), being a key partnership between Aboriginal tourism leaders, associations, organizations, and government departments which allows a collective pursuit of initiatives to support the growth of Aboriginal tourism in Canada; and
- The **Canadian Tourism Commission** (CTC) who promotes Aboriginal tourism as part of on-going market development activities.

In addition to these two national organizations, five of the provinces/territories have organizations or initiatives mandated to support the development and marketing of Aboriginal tourism (British Columbia, Quebec, Yukon, Northwest Territories and Ontario). In addition, Nunavut, while not having a distinct Aboriginal tourism directive, the majority of people in Nunavut are Inuit, and thus it can be considered that all tourism initiatives are Aboriginal tourism.

While the remaining provinces may not yet have a fully operating Aboriginal tourism organization, group or committee focused on Aboriginal tourism, most have identified Aboriginal tourism as a strategic priority for development.

Travel Trade

Fundamental to the tourism industry is the Travel Trade. The travel trades consists of in and out bound operators, who operate in one or a combination of tourism sectors, e.g., outdoor adventure, cultural, education, cuisine, cruise ships. Travel trade operators are a critical 'link' to connecting visitors with the experience, as well as promoting the tourism experience. Promotion includes marketing and representation of the experience, as well as, recommending the experience (e.g., the experience reputation).

Of importance to Aboriginal tourism is the comprehensive travel trade research conducted in 2007 on behalf of the CTC which found:

- Generally, travel trade was supportive of Aboriginal tourism;
- Receptive tour operators and those based in Europe had the most knowledge of Aboriginal tourism in Canada;
- Travel trade interviewees expressed particular concern that some businesses had poor product delivery and were not yet market-ready, including some that were being promoted as market-ready;
- The most opportunity for Aboriginal tourism was in experiential products that were authentic, not staged or artificial experiences with imitation or mass produced crafts and souvenirs; and
- Canada needed to create a much stronger awareness of its Aboriginal tourism experiences.

Consumer Demand for Aboriginal Tourism

Several market studies have revealed the potential magnitude and traits of travelers interested in Aboriginal tourism. Collectively they provide strong indications of the market and product development opportunities for Aboriginal tourism products in Canada.

Key Markets

Based on results of three studies conducted by the CTC there are clear indications that conclude that Canada's position with respect to competitive advantage lies primarily in Europe (especially France and Germany), and North America (USA, Canada and Mexico).

Asia is an identified market; however, demand is tempered by more competitive and proximate opportunities provided by Aboriginal tourism businesses in Australia and New Zealand.

Actual levels of participation in Aboriginal tourism activities (incidence) were fairly low. Overall, incidence levels hover around 20%, but vary regionally.

Traveler and Trip Characteristics

The 2006 Travel Activities and Motivations Survey (TAMS) revealed that 11% of Canadian visitors participated in Aboriginal cultural activities, but it was only a travel motivator for 3% of respondents when selecting a destination to visit. Similarly, 8% of American visitors participated in Aboriginal cultural activities, but only 3% of visitors indicated Aboriginal cultural tourism was a travel motivator.

Similarly, the 2007 CTC study of Aboriginal tourism opportunities in the United Kingdom, German and French markets found that overseas travelers were much more likely to participate in Aboriginal tourism on trips than plan their trip around it. Also, a 2008 study in the Yukon Territory also found that Aboriginal tourism activities are part of a trip's activities rather than a trip motivator.

Results from these studies lead to the conclusion that for most travelers, engagement in Aboriginal tourism experiences is a much valued 'add-on' that arises as an unanticipated side benefit in a broader purposed trip.

Aboriginal tourism opportunities are normally sought out while on trips, as opposed to during the pre-trip destination selection process.

Canada's Indigenous Competition

While there are specific, and in some places limited Aboriginal cultural experiences in Canada, Aboriginal tourism has to be considered from globally, especially since 85% of Canadians travel abroad and the other key visitor markets are international. Canada's key competitors for Aboriginal tourism experiences include Australia, New Zealand, Mexico and the United States.

Australia

Tourism Australia is the Australian Government agency responsible for attracting international visitors to Australia, both for leisure and business events. The organization is active in 17 key markets and activities include advertising, public relations and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research. The brand concept is brought to life with the statement, *Australia, the land that tells a thousand stories* and has the main messages of transformation, adventurous, nature, and wellness.

New Zealand

Tourism New Zealand's primary role is to promote New Zealand internationally though the *100% Pure New Zealand* brand. The 100% Pure New Zealand brand tells the story of how this country's unique combination of landscapes, people and activities cannot be found anywhere else in the world – it is a "100% Pure New Zealand" visitor experience. Launched in 1999, the brand has evolved over time with the latest adaption being *100% Middle-Earth, 100% Pure New Zealand,* leveraging the huge exposure New Zealand is getting around the world from the *Hobbit* movies. The *100% Middle-Earth, 100% Pure New Zealand* work was named best destination marketing campaign at the 2012 World Travel Awards.

Tourism New Zealand's has identified that unique Māori culture is one of the main reasons our visitors go to New Zealand. In fact, it ranks second (behind landscapes) for the main reason why people visit New Zealand.

Mexico

Visit Mexico, the national marketing agency has a small section on Indigenous tourism in its consumer website. Its *Magical Town's* program encourages visitation to authentic Mexican communities.

In addition, the Mexican Indigenous Tourism Network, or RITA (rough translation = Red Indian Tourism of Mexico, www.rita.com.mx) mission statement to "*Promote and strengthen the sustainability and sustainability of indigenous tourism services, as effective instruments for the conservation of cultural and environmental heritage, which forms a basis for the development of good living through access to information, capacity building and appropriate technology, fostered at all times through the active and responsible participation of its members."*[1]

United States

The Corporation for Travel Promotion, now doing business as Brand USA, was created in 2010 to encourage travelers from all over the world to visit the United States of America. The Brand USA website does not describe any activities directly related to Aboriginal/Indigenous tourism. In the United States most development and marketing occurs at the state level. For example, the Arizona Office of Tourism actively promotes and develops American Indian tourism. It has a tribal advisory committee and works with American Indian communities to develop tourism. On the national level, there is a national association called the American Indian Alaska Native Tourism Association (AIANTA).

AIANTA is a non-profit association of Native American tribes and tribal businesses organized in 1999 to advance *Indian Country* tourism. The association is made up of member tribes from six regions: Eastern, Plains, Midwest, Southwest, Pacific and Alaska.

CANADIAN REGIONAL RESULTS

The following section is a summary of the Canadian Aboriginal tourism activities by province and territory. Research for the Prairies (Manitoba and Saskatchewan), Atlantic Canada (New Brunswick, Newfoundland and Labrador, Nova Scotia and Prince Edward Island) and Northern Territories (the Yukon, the Northwest Territories and Nunavut) have been combined to produce regional results.

British Columbia

BC has a long history of over 20 years working closely with Aboriginal tourism leaders in developing the Aboriginal tourism industry with the First Nations Tourism Association in the early 1990s, and then in 1997 with the formation of the Aboriginal Tourism Association of British Columbia (AtBC). AtBC has become a world leader in Aboriginal tourism development and has credited its success with its strategic partnerships with the Destination BC, Government of British Columbia, and Canada, along with the BC tourism industry, and ongoing

[1] The Mexico Indigenous Tourism Network is a 'loose' translation to English, and there may have errors.

communication with First Nations and Aboriginal operators. Consequently, Aboriginal tourism has earned a prominent position in Destination BC's website www.hellobc.com.

BC is home to one-third of the First Nations in Canada (198) and has the second largest Aboriginal population (232,290). In 2014, there were 301 Aboriginal owned tourism businesses in BC which was 20% of all Aboriginal tourism businesses in Canada, plus 8 Aboriginal themed public (government-owned) facilities. Almost a third of businesses were outdoor and adventure, 16% were attractions, 13% were retail and 12% were accommodations. Experiences are generally located where there is a strong tourism base, such as Vancouver Island and the Okanagan, and often are interpretive and sporting activities. In BC, 4.3% of tourism businesses were Aboriginal tourism.

These Aboriginal owned businesses generated total economic impacts (direct, indirect, induced) exceeding $978 million in output (equivalent to GDP of $561 million). This resulted in 8,443 full-time equivalent jobs (FTE), nearly $299 million in wages and salaries, and over $30 million in tax revenue. Aboriginal tourism employment was estimated at 6,930.

As a leader in Aboriginal tourism, AtBC developed and implemented the AtBC Blueprint Strategy starting in 2002 that lead to Aboriginal tourism having a high profile in the 2010 Winter Olympics. The Blueprint Strategy revealed ground breaking information about the Aboriginal tourism visitor (Native Interest Visitor). This visitor is a lucrative market to BC's tourism industry staying an average of 13 days, with part of 3 days participating in Aboriginal cultural tourism, and as well that visitors who participate in Aboriginal cultural tourism spend more per trip than other visitors. Consequently, Destination BC highlighted these facts in their 2014 tourism sector profile.

> Aboriginal Tourism Association of BC found that…
> Native Interest Visitors stay an average of 13 days
> with parts of 3 days spent in an Aboriginal cultural experience,
> and spend more per trip than other visitors.

Following the implementation of the Blueprint Strategy, AtBC commissioned an audit of the plan activities. The review revealed the following.

- The average Aboriginal tourism incidence level was 22% in 2010, a staggering 69% greater than levels in 2006.
- The number of overnight visits to British Columbia, which included some form of Aboriginal cultural tourism, increased by an estimated 97% between 2006 and 2010 to approximately 3.7 million visits, almost double the 2006 level.
- Overall, overnight visitors spent an estimated $40 million on Aboriginal tourism related trips in BC in 2010. This represented a doubling of 2006 levels.
- In 2010, taxes from Aboriginal tourist related spending were about $11.3 million.
- An estimated 2,900 FTE employees comprised the Aboriginal tourism businesses workforce in 2012 representing an overall increase of 66% over 2006 levels.

Alberta

Alberta, like British Columbia, once had two established regional Aboriginal tourism Associations (RATAs) in the 1990s – one focused provincially being Niitsitapi Tourism Society of Alberta, and a localized one called the Aboriginal Tourism Authority of Alberta focused on a collective of First Nations and their tourism ventures. However, it was not long before both ceased operations due to a lack of funding support.

Following the closure of these two organizations, the Alberta Government continued to promote Aboriginal themed tourism experiences and has dedicated a webpage on the *Travel Alberta* website to Aboriginal tourism activities under "Things to Do".

Alberta has an Aboriginal population of over 220,000 and is home to 48 First Nations, the majority of who are associated with a Treaty (either Treaty 6, 7 or 8) and a prominent Métis community. The Métis community has a strong presence and representation in many Aboriginal tourism and other economic initiatives.

In 2014, there was 86 Aboriginal owned tourism businesses in Alberta, and an additional 54 were Aboriginal themed public (government owned) facilities. These businesses represented 6% of all Aboriginal tourism businesses in Canada, and 4.2% of tourism businesses in Alberta. Together Aboriginal tourism generated over $296 million in economic output and nearly $170 million of GDP. Further, Aboriginal tourism created 2,272 jobs (full-time equivalent), generating nearly $93 million in wages and salaries, and almost $8 million in tax revenue. Directly, an estimated 2,065 people were employed in Aboriginal tourism.

In terms of opportunities for Aboriginal tourism in Alberta, a 2013 study of urban Albertans participation in rural vacation experiences (in Alberta) found that potential exists to draw visitors to Aboriginal experiences, although Aboriginal tourism is still considered a niche product. In addition to opportunities, a 2010 analysis conducted for Aboriginal tourism in Alberta identified development barriers that included access to funding, limited awareness of the Aboriginal tourism industry in Alberta, capacity issues and social issues.

Prairies – Saskatchewan and Manitoba

The Aboriginal population in Saskatchewan and Manitoba exceeds 350,000 people (158,000 in Saskatchewan, and 196,000 in Manitoba), which represents a quarter (25.2%) of the Aboriginal population in Canada. Saskatchewan has 70 First Nations, and Manitoba has 63 First Nations. Winnipeg, Manitoba also has the highest urban Aboriginal population.

Aboriginal tourism in these provinces had a kick start in the 1990s when Saskatchewan and Manitoba each established a provincially focused Aboriginal tourism organization; and as with most other regions, these two organizations were closed due to lack of resources. Currently, there are no regional organizations proposed, and currently there is a perceived lack of awareness and support for Aboriginal tourism in these provinces.

In 2003, following the demise of the Manitoba Aboriginal Tourism Association, the Government of Manitoba completed the first phase of an Aboriginal tourism strategy outlining three broad concepts. The second phase (implementation) has not been completed and is currently under review.

The provincial tourism organizations include Aboriginal tourism within their web pages. Saskatchewan's tourism website, *Discover Saskatchewan* has an Aboriginal exclusive page, which is accessible by two clicks. As for *Travel Manitoba*, there is no Aboriginal exclusive page; however, Aboriginal tourism information is accessible by two clicks from the landing page.

This region in 2014 has 126 Aboriginal owned tourism businesses in the Prairies (Manitoba and Saskatchewan) plus 68 Aboriginal themed public (government-owned) facilities in 2014. These represented 14% of all Aboriginal tourism businesses in Canada. They generated an estimated 4,011 jobs (full-time equivalent), resulting in over $430 million of economic output and $237 million of GDP. Further there was $119 million of wages and salaries generated, and $14.8 million of tax revenue. Aboriginal tourism employed an estimated 3,829 workers.

Ontario

In the 1990's there were two RATAs in Ontario: the Northern Ontario Native Tourism Association (NONTA), and Aboriginal Tourism Association of Southern Ontario (ATASO). They served the provinces 139 First Nations and over 300,000 Aboriginal people. However, both organizations closed in 2000 due to lack of funding. In April 2014, the creation of the Aboriginal Tourism Ontario (ATO) was announced, although there is much expressed interest from the Ontario Ministry of Tourism, ATO is not yet fully functional.

Ontario's presence in Aboriginal tourism is substantial having the greatest number of Aboriginal tourism businesses (479) which was 31% of all Aboriginal tourism businesses in Canada. This was up from the 26% in 2001. The majority (469) were Aboriginal owned, while 10 were Aboriginal themed public (government-owned) facilities. These businesses created total economic impacts of 14,044 jobs (full-time equivalent) equating to $1.7 billion in output and $957 million of GDP. Of this, $497 million was paid in wages and salaries over $63 million in tax revenue generated. Direct employment by these Aboriginal owned tourism businesses was 11,108.

Three initiatives have continued to move Aboriginal tourism forward in Ontario. These are: 1) in Ottawa, an urban Aboriginal cultural attraction called *Aboriginal Experiences* that offers performances, foods, and coordinates a major festival; 2) headquartered on Manitoulin Island, the *Great Spirit Circle Tour* offers nature-based, cultural, eco-tourism, and educational tours; and 3) *Six Nations Tourism Association* (under Six Nations Economic Development) that promotes and facilitates tourism development in Six Nation traditional lands. In addition, the provincial tourism organization *Ontario Travel* has prominently featured Aboriginal tourism on its landing page with a listing in the drop down page through "Play".

In 2010 the Ontario Tourism Marketing Partnership Corporation (OTMP) summarized information about Canadians that included Aboriginal events in their trips. Among a number of findings, Ontario experienced the highest (of all provinces) number of trips that included attending an Aboriginal event (208K) by Canadians. This equals about one-third of all Aboriginal event attendance in Canada.

> Ontario experienced the highest number of trips of all provinces that included attending an Aboriginal event (208,000) by Canadians.

A few Ontario studies on Aboriginal tourism illuminated the Aboriginal tourism visitor. A 2012 study of Ontario's key markets (Ontario, Quebec, Manitoba and the USA) found that only 2% of travelers experienced Aboriginal culture while travelling that year. Virtually none of those travelers indicated it was the main reason for their trip. In 2014, the Great Spirit Trail Circle conducted a survey of Aboriginal tourism businesses in northern Ontario. Key findings are listed below.

- 67% of businesses believed receiving support from an Aboriginal tourism association provides value.
- 91% believe they are NOT market-ready, and only a small proportion believed they were ready to do business with national (16%) or international (11%) markets.
- About 22% of businesses fully understand the role of receptive tour operators, 44% replied they 'somewhat' understand the role.
- Under half (44%) of businesses were able to provide pricing and program details at least 6 months in advance.
- To become market-ready, businesses felt they needed the support in marketing (34%), finding qualified staff (31%), training and business development (30%) or other areas (4%).
- The majority of businesses are very small operators and employ 1-2 staff (48%) or 2-4 staff (9%), although 27% employed more than eight staff.
- About 67% of businesses operated for more than 5 years, 21% were 1-2 years old, while 12% were 3-5 years old.
- The top 5 challenges to being competitive were – marketing/funding (21%), travel distances (15%), pricing (9%), services (9%), and skilled workforce (9%).
- A third of businesses believed partnerships with other First Nations businesses would help grow their business, while fewer believed partnerships with financing organizations (19%), marketing organizations (13%), and tour operators (9%) would help grow their business.
- The top 4 training and employment programs that would most benefit tourism businesses were customer service (24%), business support (16%), management (11%) and heritage/land (11%).

Quebec

In Quebec there is over 140,000 Aboriginal people, and 55 Aboriginal communities belonging to 11 Indigenous Nations (10 First Nations and 1 Inuit Nation). The two official languages in Quebec are English and French; however, while many First Nations people are bi-lingual, the second language spoken is typically their traditional First Nation language. Although many youth speaks their native language as a second language after French or English, many Elders kept their native language as their mother tongue. Quebec has the highest number of individuals (40,000) who speak Aboriginal languages in Canada.[2] It also has the fewest English speakers (17%)[3], and 82% of the population speaks mostly French at home.

[2] http://www.pch.gc.ca/eng/1358868579399/1358868857421

[3] IBID.

Quebec has the longest standing Aboriginal tourism organization in Canada. Established in 1991, the organization has an ongoing relationship with the Government of Quebec and the provincial tourism organization. The organization serves 55 different Aboriginal communities having expanded from its original focus of Innu Nation, and then expanding to include the full 11 provincial Nations a couple years after opening.

Quebec tourism has 22 tourism regions, and promotes tourism through the bonjourquebec.com website in both official languages – French and English.

In 2014, there were 198 Aboriginal tourism businesses in Quebec which was 13% of all Aboriginal tourism businesses in Canada. This was down from 14% reported in 2001. Almost all Aboriginal tourism businesses identified (197) were Aboriginal owned, while one was Aboriginal themed (public /government-owned) facilities.

A 2010 economic impact study of Aboriginal tourism in Quebec revealed growth in the sector and cited a 65% increase in economic impacts between 2002 and 2010 ($169 million). This study revealed the total economic impact of Aboriginal tourism in Quebec was $526 million of output and $303 million of GDP. This resulted from 5,084 jobs (full-time equivalent), contributing $157 million in wages and salaries, and over $12 million in taxes. Direct employment in the 197 Aboriginal tourism businesses was estimated at 4,428 workers.

Further in 2010 Tourism Quebec invested in a study of Aboriginal tourism that recommended four broad pillars of work to be completed.

1) Determine a vision for Aboriginal tourism.
2) Cultivate the Tourism Autochtone Québec as an organization – recognize a general shift from marketing to product development.
3) Support business development through education and coaching – push to market-ready standards.
4) Develop products sought by consumers that is authentic, tied to the environment, physical and engages learning. Also there is a gap in the authentic product in Montreal.

Atlantic/Maritimes

Aboriginal people total nearly 95,000 people in Atlantic/Maritimes, and represent 6.7% of the Aboriginal population in Canada. There are 34 First Nations in the Atlantic/Maritimes of which 4 are in Newfoundland and Labrador, 15 are in New Brunswick, 2 are in Prince Edward Island, and 13 are in Nova Scotia.

The size of the Atlantic/Maritimes Aboriginal tourism industry represents 9% (143) of all Aboriginal tourism in Canada. This was up from the 5% in 2001. Almost all (138) were Aboriginal owned, while 5 was Aboriginal themed public (government-owned facilities). In northern Newfoundland and Labrador, the businesses primarily service oil and gas, mining and forestry industries, yet have potential for greater involvement in tourism.

In the late 1990s, like the other provinces/territories, Atlantic/Maritimes had a regional Aboriginal tourism organization which after a few years closed. Recently there have been discussions of establishing another multi-provincial Aboriginal tourism organization, however, it has not gone further.

While there are ongoing Aboriginal tourism activities, mostly driven by the First Nations in these provinces, there are some focused activities by area governments. For example, the Nunatsiavut Government (Tourism Nunatsiavut) invested in a refreshed comprehensive tourism strategic plan (2014) that will guide the development of tourism for the Labrador Inuit. The five strategic pillars are:

1) **Preserve and celebrate** – the Labrador Inuit of Canada;
2) **Visitor economy focus** – on things that attract visitors;
3) **Sustainable community** – which tourism is one element and other elements include strong communities who welcome guests;
4) **Collaborate** – with surrounding communities to compete; and
5) **Operational excellence**.

Also, the Maritime Provinces tourism websites all include Aboriginal tourism to some degree.

- **Newfoundland and Labrador** (www.newfoundlandlabrador.com) – through this website one click from the landing page brings the viewer to Aboriginal tourism, however, there is no Aboriginal exclusive page and Aboriginal imagery is scarce.
- **New Brunswick** (www.tourismnewbrunswick.ca) – has a landing page featuring "Mi'kmaq" Aboriginal tourism, however, it takes two clicks to reach it.
- **Prince Edward Island** (www.tourismpei.com) – information on Aboriginal tourism is located by using the search engine to locate the pages as there is no webpage exclusive to Aboriginal tourism.
- **Nova Scotia** (www.novascotia.com) – information on Aboriginal tourism is reached after two clicks from the landing page under the drop down heading "Explore" which brings the viewer to the page "Mi'kmaq culture". Arts and cultural packages include the listing "Discover Mikmaw Traditions" suggesting activities to do.

Secondary research of Atlantic/Maritimes tourism industry, and in particular tourism research revealed the following for each province.

- **Newfoundland and Labrador** – The 2011 Labrador Travel Survey provided some insight into traveler's perceptions of Aboriginal tourism. Research revealed that the greatest level of interest in Aboriginal tourism was among non-residents (32% ranked in 8+/10 on a level of interest scale), which was higher than activities like fishing (25%), geo-tourism (20%), hunting (8%), and spiritual tourism (6%), but below nature-based (61%), general cultural tourism (60%), adventure travel (53%) and ecotourism (42%). Similarly, residents ranked Aboriginal tourism (51%) above spiritual tourism and ecotourism (45%), and geo-tourism (41%), but below fishing (83%), nature-based (71%), adventure (56%), hunting (66%), and cultural tourism (60%).
- **New Brunswick** – Similar to other provinces, data summaries indicate the proportion of tourists participating in Aboriginal tourism is relatively low. In 2009/10, there were 7,000 Canadian residents that attended Aboriginal cultural attractions on trips of one or more nights. The Canadian Tourism Commission's Explorer Quotient identified that 13-21% of target Authentic Experiencers and Cultural Explorers from Canada, USA and overseas seek Aboriginal attractions and events.
- **Prince Edward Island** – Market research in Prince Edward Island (PEI) studied the potential for Aboriginal tourism opportunities, especially basket weaving. The research used the *Travelers Voice*

online research panel to identify and examine the target market for Aboriginal tourism in PEI. The top five activities of interest to potential Aboriginal tourists were:

- Hearing legends as told by Aboriginal people;
- Viewing Aboriginal artifacts;
- See the way Aboriginal people lived their lives;
- Trying traditional cuisine; and
- Watching ceremonial dances.

- **Nova Scotia** – Information on Nova Scotia tourism summaries was not available to this study.

North

In northern Canada there are around 68 First Nation/Indigenous communities – 14 in Yukon, 26 in Northwest Territories (of which two are Indian Reserves), and an estimated 28 hamlets/communities in Nunavut. Unlike other Canadian provinces where First Nations primary communities are Indian reserves, the north is mostly communities or hamlets. Aboriginal people are the majority population in the north although the north accounts for 4% of the Canadian Aboriginal population. The largest component is Nunavut (86.3%) followed by the Northwest Territories (51.9%), and in the Yukon (23.1%).

In 2014, there were 278 Aboriginal tourism businesses in the three northern territories, which was 14% of all Aboriginal tourism businesses in Canada. This was down from the 26% in 2001 but up from 230 in businesses and reflects the growth in other parts of Canada. The majority (250) were Aboriginal owned, while 28 were Aboriginal themed public (government-owned) facilities.

The Yukon is the only northern territory that has an independent organization, the Yukon First Nations Culture and Tourism Association (YFNCT) (www.yfnct.ca). Of importance to Aboriginal tourism in the North are the Yukon First Nations land claim agreements which were settled between 1993 and 2006. Of the 14 Yukon First Nations, 12 have negotiated Self Government Agreements for their people.

The Northwest Territories (NWT) and Nunavut's Aboriginal tourism initiatives are integrated into the territorial tourism plans. However, NWT has an Aboriginal Tourism Champion Council that advises on initiatives and plans focused on Aboriginal tourism, while in Nunavut, Aboriginal tourism is incorporated into Nunavut Tourism operations.

In additional to territorial tourism planning Aboriginal is also central to their website content.

- **Yukon** (www.travelyukon.com) – Aboriginal images are easily identified in the home page scrolling banner, and immediately link the viewer to Aboriginal tourism (no clicks required). There are also Aboriginal tourism package recommendations.
- **Northwest Territories** (www.spectacularnwt.com) – Like Yukon, Aboriginal images on the NWT Tourism (DMO) website are immediately and easily identified on the home page.
- **Nunavut** (www.nunavuttourism.com) – Aboriginal images are featured on the home landing page, with the tourism logo being an Inuit design. There is no exclusive Aboriginal tourism page, however, in

Nunavut where 86% of the population is Indigenous, differentiation of the Indigenous tourism experience is not necessary. The website also recommends several Aboriginal tourism packages.

Other secondary research found that:

- The cruise ship industry plays a major role in tourism. In Nunavut, coastal hamlets rely on cruise ships to bring the visitor, and in Yukon, the Alaska cruise ship industry links through the rail and tour buses;
- A 2012 Yukon visitor survey concluded that 16% of summer travelers and 18% of winter travelers participated in activities that included First Nations culture;
- A 2009 Yukon based study concluded that general interest in Aboriginal cultural tourism experiences in Yukon is high;
- In NWT 64% of visitors participated in Aboriginal tourism (up from 14% in 2010);
- In 2013 the NWT Aboriginal Tourism Champions Advisory Council published comprehensive recommendations for NWT tourism strategic plan that focused on three pillars: people, communities and business;
- Nunavut conducted a 2011 visitor exit survey that concluded that one third of visitors to Nunavut participated in one or more forms of Aboriginal tourism (arts and crafts purchases, visiting a cultural center, other); and
- Nunavut has developed a strategy for tourism development in Nunavut focused on renewal; partnerships; attractions; products and services; and Education and training.

SUMMARY OF FINDINGS

Growth in Economic Impacts

Overall there are more Aboriginal tourism experiences, and greater relationships with government agencies, provincial and territorial tourism organizations, destination marketing organizations and the travel trade; however, the greatest negative impact has been the loss of regional Aboriginal tourism organizations. Despite this loss, there can be no doubt that Aboriginal tourism businesses have grown substantially in Canada during the time these two studies were undertaken (2002 and 2014).

- **The universe of the number of Aboriginal tourism businesses has expanded** from 892 in 2002 to more than 1,500 in 2014.
- **Direct employment of the Aboriginal tourism sector has increased.** In 2002, there was an estimated 12,566 people employed (including employment in casinos). Today it is estimated to be three times larger at an estimated 33,100.
- **Direct gross output from Aboriginal tourism businesses has increased.** The growth is an estimated $0.37 billion at $2.65 billion in 2014, up from $2.28 billion in 2002.
- **Direct GDP contribution from Aboriginal tourism sector has grown.** The current study estimated the GDP at $1.4 billion, while it was estimated at $596 million in 2002. This difference may be attributed to the difference in the underlying industry distribution within the Aboriginal tourism sector between the two studies.

Aboriginal Tourism Recipe for Success

Research has revealed that success in Aboriginal tourism businesses stems from operations, establishing and maintaining networks, respecting and sharing culture in an appropriate way, involving community and planning for the future.

While there are commonalities in Aboriginal tourism between provinces and territories, markets and opportunities in Aboriginal tourism varies by province and territory.

Ongoing support of Aboriginal tourism businesses has been partly due to regional focus on supporting Aboriginal tourism through regional economic development, planning and prioritizing.

Barriers to Growth

Overall, other than a few differences, commonly raised barriers /challenges of Aboriginal tourism growth were similar between Aboriginal tourism, government and other DMO professionals. Aboriginal tourism professionals commented more about the lack of organization and coordinated approaches to tourism development, government on institutional matters, and DMO on the lack of community support, availability of product in major urban areas, lack of products in urban areas, access to business capital and market perceptions of injustice.

1) Lack of organization and coordinated Aboriginal tourism approaches.
2) Lack of market-readiness.

3) Deficiency of a qualified workforce.
4) Availability of recent research.
5) Infrastructure challenges identified were similar to other tourism businesses.
6) Lack of community support is prominent.
7) Language of preference barriers.
8) Lack of Aboriginal cultural tourism product.
9) Limited access to business capital and support.
10) Key market perceptions of injustice.

Opportunities

Common opportunities identified through interviews, surveys and secondary research were:

1) Product development is critical to securing greater travel trade interest and partnerships with Aboriginal tourism, and for building confidence within the Aboriginal community by visitors. This can be done through training and development programs for the Aboriginal tourism operations and labour. Suggested training is leadership and business skills, customer service, tourism industry knowledge, and cultural protocols.
2) Improve competitiveness through enhanced business development with mainstream tourism businesses/associations and network development with industry leaders.
3) Meet consumer demand through enhanced product development. There is consumer demand for Aboriginal tourism experiences that is authentic, unique and engaging, such as providing learning opportunities. These can be paired with wilderness, nature-based soft or hard adventures, food, arts and culture. They should exist in gateway communities to promote going 'beyond the gateway'.
4) Enhance livelihood for tourism businesses and local tourism economies through building support from local communities, and establishing strong industry associations.
5) Increase demand through marketing that raises awareness of Aboriginal tourism in Canada, and converts interest to visitation.
6) Work collaboratively on destination, business and product development with other Aboriginal tourism businesses and the tourism industry.

INTRODUCTION AND BACKGROUND

This section is an introduction to the research, by providing background on activities leading to this project, the project purpose, how research was collected, limitations, and scope of the report.

ABORIGINAL TOURISM ASSOCIATION OF CANADA (ATAC)

NATIONAL ABORIGINAL TOURISM RESEARCH 2015:

Economic Impact of Aboriginal Tourism in Canada

1 Introduction and Background

In 2002, the last major study on Canada's Aboriginal tourism industry was conducted; the *National Study of The Aboriginal Tourism Industry in Canada*. Since then, there have been many changes in Aboriginal tourism throughout Canada and globally. Then, in Canada nearly every province and territory had a regional Aboriginal tourism organization or initiative, and there was Aboriginal Tourism Team Canada which supported Aboriginal tourism development nationally and the regions. Not long after, many of the regional organizations including the ATTC ceased operations. Aboriginal Tourism Association of Canada (ATAC) became the national successor to ATTC, and in May 2014 issued a request for proposals to determine the state of Aboriginal tourism industry in Canada, opportunities and trends, and needs and the economic impact on tourism.

The 2002 study found that Aboriginal tourism was a larger economic generator than previously anticipated, which in 2001 generated $4.9 billion in Canada (when including casino revenues), of which 59% of the total was from tourism expenditures. Further, the direct contribution to the GDP from Aboriginal tourism businesses' was $290 million, which with casinos included shot up to $596 million. At that time, an estimated 13,000 full-time equivalent jobs were also attributed to Aboriginal tourism. The study confirmed there was growing interest in the Aboriginal tourism experience that opportunities for food and beverages, accommodations, outdoor activities, cultural and interpretive centers existed.

The purpose of this project was to:

1) Develop a current profile of the Aboriginal tourism industry in Canada in a determination of whether there has been progress since 2002;
2) Understand tourism industry trends, especially how they pertain to Indigenous tourism, and identify opportunities and challenges associated with these trends; and
3) Ascertain the direction and needs of Canada's Aboriginal tourism industry to move forward.

This study utilized both qualitative and quantitative information collected through literature review (secondary data collection), data collection through online surveys with Aboriginal tourism operators and the travel trade, development of Aboriginal tourism businesses in each province and territory, conducting analysis of the information like research studies and strategies, conducting internet research, interviewing Aboriginal, industry and government leaders, and conducting analysis of the information to prepare a profile of the Aboriginal tourism industry and to calculate the economic impact of Aboriginal tourism.

About ATAC

ATAC was borne from industry leaders that were involved with ATTC. First, ATAC operated as an informal group under the name the Aboriginal Tourism Marketing Circle (ATMC), then in summer 2014, formerly established as Aboriginal Tourism Association of Canada. Over 20 Aboriginal tourism industry organizations and government representatives from across Canada are party to ATAC by signatory to a 2002 Memorandum of Understanding (MOU). Through a unified Aboriginal tourism industry voice, ATAC focuses on creating partnerships between associations, organizations, government departments and industry leaders from across Canada to support the growth of Aboriginal tourism in Canada.

Study Approach, Methodology and Limitations

For this project, ATAC established a team of representatives from **British Columbia, Manitoba, Ontario, Quebec, Saskatchewan,** and **New Brunswick** for this project to be the Project Steering Committee.

In conducting the research, more than 70 interviews were completed with key informants, being – Aboriginal Tourism Association of Canada members, federal and provincial government agencies related to economic development, tourism and / or Aboriginal development, and tourism industry leads including destination marketing organizations (DMOs).

In addition to interviews, two surveys were also done with Aboriginal tourism operators, and travel trade operators. Administration of these surveys encountered a few hurdles. The first was ensuring the survey operated in compliance with the new Canadian Anti-spam Legislation which came into force June 2014. This legislation restricts contact with people and businesses where there is no previous relationship. The second hurdle was identifying Aboriginal tourism operators Canada wide, and communicating with them while staying in compliance with legislation. Consequently, ATAC members performed an active role by inviting their Aboriginal tourism operator and travel trade contacts to participate in the surveys. The surveys were administered online, with the Aboriginal tourism operator survey being available in English and French languages. Both surveys utilized questions from previous Aboriginal tourism and travel trade surveys prepared nationally and by the Aboriginal Tourism Association of BC. The Aboriginal tourism operator survey resulted in 132 surveys completed of which 101 were majority and partly Aboriginal owned. The travel trade survey had 37 respondents.

Background research and studies were gathered on tourism industry strategies, statistics for provinces and territories, and as possible on Aboriginal tourism planning. Studies were also collected on international tourism, focusing on trends and statistics, as well as global Indigenous tourism opportunities and plans.

Provinces and territories where there are Aboriginal tourism organizations or initiatives (e.g., NWT Aboriginal Tourism Champions Circle) were organized to provide background research, invite participation to the online surveys, and provide lists of Aboriginal tourism operators for the national inventory. In provinces/territories that did not have regional Aboriginal tourism associations, the ATAC members provided the information they had and distributed survey invitations. In regions of Canada where Aboriginal tourism organizations were absent or support was low, the Aboriginal tourism inventories were under-developed and their lacked sufficient relevant Aboriginal tourism studies. Consequently, a national inventory of Aboriginal tourism was prepared by province and territory that identified all major and minor Aboriginal owned tourism-related business. The businesses were listed by location (town and province or territory), and categorized by ownership and primary tourism sector (in any of industry identified eight tourism sectors[4]).

It was necessary to characterize ownership by Aboriginal (major and minor) and non-Aboriginal ownership (government/public and private) as the inventory was the central source for calculating the economic impact of Aboriginal tourism in Canada.

An additional difficulty in developing the inventory was that while ATAC has a generally accepted definition of Aboriginal tourism, the definition is not fully adopted or applied in all provinces and territories resulting in "Aboriginal themed" non-Aboriginal owned experiences promoted as an Aboriginal tourism experience.

Exhibit 1-1: ATAC Aboriginal Tourism Definition

Aboriginal Tourism – all tourism businesses majority owned, operated and / or controlled by First Nations, Métis or Inuit peoples that can demonstrate a connection and responsibility to the local Aboriginal community and traditional territory where the operation resides.

Aboriginal Cultural Tourism – meets the Aboriginal tourism criteria and in addition, a significant portion of the experience incorporates Aboriginal culture in a manner that is appropriate, respectful and true to the Aboriginal culture being portrayed. The authenticity is ensured through the active involvement of Aboriginal people in the development and delivery of the experience.

Aboriginal Cultural Experiences – offer the visitor a cultural experience in a manner that is appropriate, respectful and true to the Aboriginal culture being portrayed.

(SOURCE: ATAC Aboriginal Cultural Tourism Guide)

Aboriginal themed tourism experiences are those activities that offer an Aboriginal cultural experience, but may not have Aboriginal ownership. These are typically government or publicly owned museums, parks and heritage sites.

Scope

This report begins with **Part 1: Primary Research** results that highlight key findings from the Aboriginal Tourism Operator and the Travel Trade surveys. Following this are summaries of interviews with Aboriginal, government and tourism industry key informants.

Next is **Part 2: Industry Research** that highlights statistics and trends in the global tourism industry, specifically Canada's tourism industry, and provides profiles of key markets and barriers to growth. An overview of

[4] The eight tourism sectors are: Attractions, Accommodations, Outdoor Adventure, Food and Beverage, Festivals and Attractions, Retail, Transportation, Tourism Services.

Aboriginal tourism in Canada follows on reports on the supply (Aboriginal tourism organizations and businesses) and demand (consumer summary) sides of Aboriginal tourism. These components are evaluated to look at Canada's competitive in Indigenous tourism globally, the constraints, issues and barriers, as well as opportunities. Highlights of four case studies are presented and reference the full stories which are provided in the Appendices.

Part 3: Economic Impact reveals the economic outputs of Aboriginal tourism in Canada, for example, jobs created, Gross Domestic Product, government tax revenue generated, the magnitude of Aboriginal tourism employment versus the tourism industry, and multipliers.

Regional Aboriginal tourism profiles are provided in **Part 4: Regional Profiles** highlighting historical and current Aboriginal tourism activities, presence, participation, key markets, trends and opportunities by region (e.g., province, Northern territories, Atlantic/Maritimes, and Prairies).

Finally, the report concludes with **Part 5: Summary of Findings** which highlights key observations of the research.

PART 1: PRIMARY RESEARCH

This section summarizes information collected specifically for this research project. Primary research conducted includes interviews with key Aboriginal, government and tourism industry informants. It also included online surveys with Aboriginal tourism operators and travel trade representatives.

2 Aboriginal Tourism Operator Survey Responses

2.1 Aboriginal Tourism Businesses Profile

The following sections provide a snapshot profile of the nature and scope of Aboriginal tourism businesses in Canada. More specifically, they describe key ownership, product and service, marketing, operating, and growth prospects associated with Aboriginal tourism businesses in Canada. Data used to inform this profile are derived from the self-reporting responses of business operators participating in an on-line survey conducted in the fall of 2014. The 132 respondents are a self-selected sample of owners and / or managers drawn from a larger pool of Aboriginal tourism operations identified and invited by ATAC members to participate in the survey.

While not all respondents reported the ownership status of their business, 101 of them indicated that their operation was at least partially owned by Aboriginals. Of these businesses, 99 of them were reported to possess 51% or more Aboriginal ownership, and 88 of those were identified as being fully owned Aboriginal enterprises. Depending on the issue examined, varying combinations of these various groups of respondents are included in the findings presented.

Given the non-random self-selecting nature of the sample as well as varying business response rates across regions, the findings presented are not necessarily representative of all Aboriginal tourism businesses in Canada, nor of each region. For instance, while the largest proportion of reporting businesses are from British Columbia (25%) and Quebec (23%) where significant concentrations of such operations exist, other regions such as Ontario and Nunavut are underrepresented. Notwithstanding these sampling challenges, the profile does provide valuable insights into many Aboriginal tourism businesses that are shaping the growth and competitiveness of this growing sector of Canada's tourism economy.

2.2 Ownership

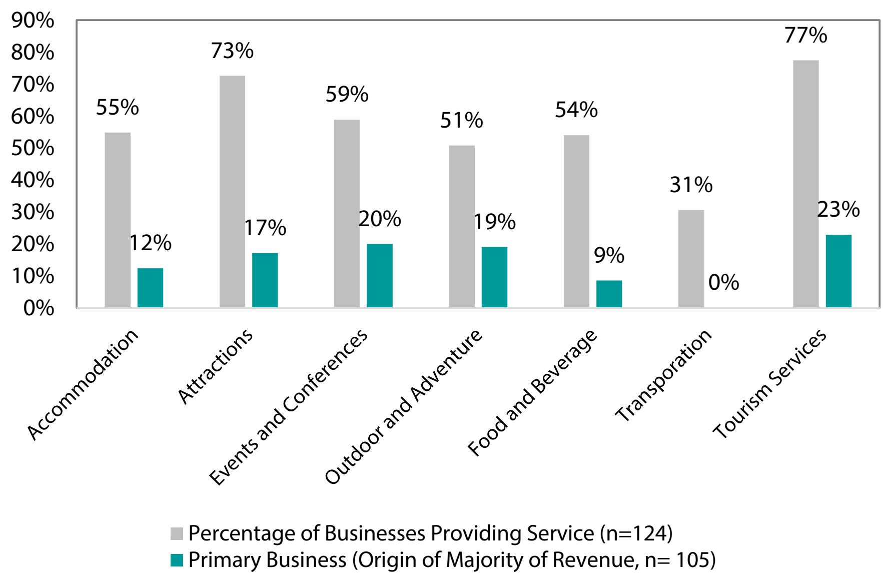
About fourth fifths (83%) of all businesses participating in the initial on-line survey were at least 51% owned by Aboriginals. A full 74% of the enterprises (88) were 100% Aboriginal owned (Appendix 3, Table 1: Percentage Aboriginal Ownership of Surveyed Businesses). The largest proportion of the Aboriginal-owned businesses belonged to either individual Status Indians (29%) or single Community Bands (24%) (Appendix 3, Table 2: Aboriginal Business Ownership Type).

From a legal perspective the majority of them were either structured as private proprietorships (20%), not for profit corporations (20%), or corporations (18%) (Appendix 3, Table 3: Business Ownership Legal Structures). Overall, the primary location of the Aboriginal owned businesses were almost evenly split between reserve (51%) and off-reserve (49%) sites (Appendix 3, Table 4: Aboriginal Business Primary Locations).

2.2.1 Products and Services

Aboriginal owned tourism businesses indicated that they were primarily engaged in either the management and delivery of general tourism (28%), events and conferences (20%), outdoor and adventure activities (19%), or attraction related products or services (17%) to generate the majority of their revenues. Business operations were rarely involved in a single venture. Most entailed more than a single revenue generating pursuit. Those ventures most frequently employed in combination with the primary business were most apt to be general tourism services (77%) or attraction activities (73%) (Exhibit 2-1).

Exhibit 2-1: Tourism Products and Services Summary



General tourism services most typically delivered included guided tours (73%) or retail gift merchandising (54%) (Appendix 3, Table 5). Event and conferences were most frequently associated with the delivery of cultural festivals (48%) or traditional music and dance performances (44%) (Appendix 3, Table 6: Events and Conferences).

Outdoor and adventure activities most often involved either wildlife or nature viewing (63%) or boating tours (40%) (Appendix 3, Table 7: Outdoor and Adventure Services).

Attraction related products and services most usually entailed various forms of cultural interpretive (60%) or wildlife/nature (31%) sites and programming (Appendix 3, Table 8: Attractions).

2.3 Cultural Experiences

About 86% of the businesses reported that their operations included Aboriginal cultural experiences in their product and service offerings (Appendix 3, Table 9: Aboriginal Cultural Experience Provided). Those most frequently mentioned cultural elements included Aboriginal themed performances, displays and interpretive programming (72%), general cultural atmosphere (69%), and information displays and tours (64%), and traditional events (55%). (Exhibit 2-2)

Exhibit 2-2: Aboriginal Cultural Experience Summary

Aboriginal Cultural Activities	# Businesses Providing Activity	% of Businesses
Performance/Demonstration/Interpretation	89	72%
Aboriginal Cultural Atmosphere	86	69%
Information Displays/Indoor Tours	79	64%
Traditional Events	68	55%
Music	61	49%
Nature-Related	54	44%

Business activities involving Aboriginal themed performances were most apt to be associated with the creation and / or delivery of arts and craft (73%), story-telling (66%), or lecture type ventures (62%). These activities were primarily (80+%) delivered by Aboriginal employees (Appendix 3, Table 10: Cultural Programs).

Creating an overall atmosphere of Aboriginal culture was most frequently conveyed via a combination of traditional food (71%), facility décor (69%), and language (spoken or sung (63%) initiatives. In most cases (70%+) these activities involved direct participation by Aboriginal people in the creation and / or presentation of these components of the Aboriginal cultural atmosphere conveyed (Appendix 3, Table 11: Cultural Atmosphere). In those businesses incorporating music (40%) into their cultural experiences, 86% of the organizations provided live performances of contemporary and traditional genres delivered almost always (96%) by Aboriginal people (Appendix 3, Table 12: Aboriginal Music).

Businesses incorporating traditional themed events were most likely to be involved with community celebrations such as feasts (54%) or pow-wows (31%). They primarily (80+%) employed Aboriginal staff (Appendix 3, Table 13: Traditional Events).

Businesses incorporating various forms of interpretive cultural displays into their operations did so most frequently via a combination of visitor orientation (63%), static exhibits (57%), and guided tour activities (52%) initiatives. More than 60% of the organizations managing and delivering these programs employed Aboriginal people for these purposes (Appendix 3, Table 14: Tours and Information Displays).

Guided nature tours were the most commonly (58%) offered form of nature related cultural activity. Almost all of the businesses (92%) providing such programming employed Aboriginal guides for such purposes (Appendix 3, Table 15: Nature-Related Activities).

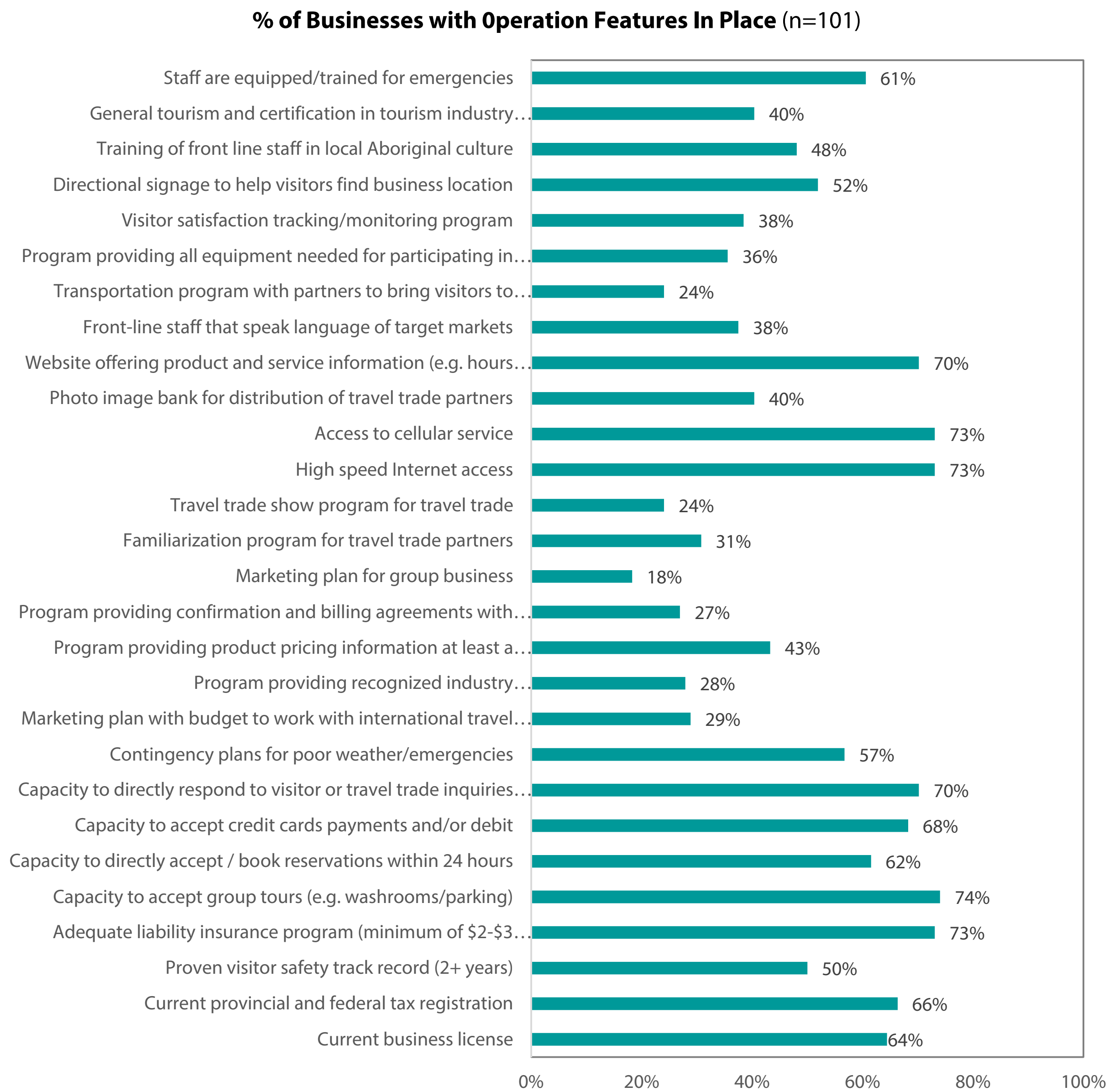
The presence of management processes to ensure the appropriateness of those cultural components incorporated into Aboriginal products and experiences were noted by many of the respondents. Overall, about

78% of the Aboriginal tourism businesses providing related cultural experiences reported that they had processes in place to ensure the cultural integrity of their offerings.

2.4 Marketing Characteristics

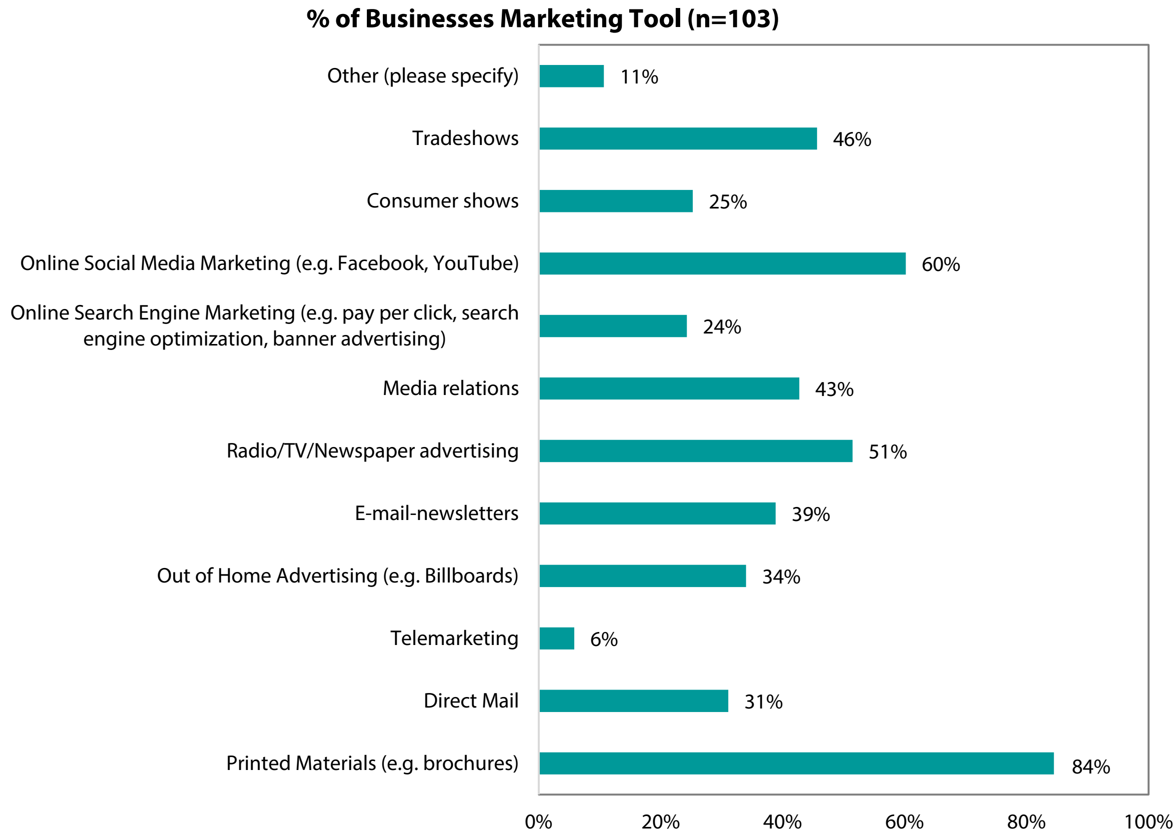
Aboriginal tourism operators employed a variety of approaches to make their products and services more market-ready for travelers and the travel trade. Most frequent practices (70%+) included possessing: the physical and operational capacity to host group tours; adequate liability insurance; reliable cellular phone service; high speed internet access; and systems for responding quickly to travel trade requests. Least evident (<30%) were marketing plans and adequately resourced programs designed to: attract group and international business, build transportation alliance making business locations more accessible; improve booking and billing systems; and strengthen travel trade show presence (Exhibit 2-3).

Exhibit 2-3: Market Ready Strengthening Support Systems



Marketing communication tools predominantly used to promote their offerings included: traditional print brochure materials (84%), on-line social media (60%), as well as radio/TV and newspaper advertising (57%). Least used communication channels (<30%) included consumer shows, search engine marketing and telemarketing (Exhibit 2-4).

Exhibit 2-4: Marketing Communication Tools Employed



Amongst those businesses using social media, the most frequently mentioned communication tools were Facebook (96%), Twitter (42%) and YouTube (37%) (Appendix 3, Table 16: Social Media Used).

Building stronger travel trade alliances and trust was an area of strategic importance to operators. Critical to this initiative was being able to respond to their needs in a timely manner. Overall, about half (48%) of the businesses indicated that they were able to comply with most travel trade requests within 24-hours. Response times were generally faster on week-days during peak season, as opposed to other times of the week and year (Appendix 3, Table 17: Response Time to Travel Trade Requests).

2.5 Market Characteristics

Responding Aboriginal tourism businesses varied considerably in their annual levels of tourist visits. Almost two-fifths (38%) of them serviced less than 500 people during 2013. Conversely, another fifth (20%) of them hosted more than 5,000 visitors during that time period (Appendix 3, Table 18: Visitation in 2013). While the source of these travelers varied considerably between businesses, on average the largest share of visitors (~55%) were derived from relatively localized provincial /territorial sources, and another fifth (~22%) came from other parts of Canada (Exhibit 2-5).

International visitation was largely sourced from primarily United States and European markets. On average each contributed less than 20% to total business visitation (Exhibit 2-5).

Exhibit 2-5: Market Sources

	Average % /Business (n = 88)	# of Businesses
Your Province/Territory	55	73
The Rest of Canada	22	63
United States	16	58
Europe	17	59
Asia	4	24
Other Country	7	32
Don't Know	76	16

In businesses where European markets were tapped, on average the largest shares of them came from either Germany (38%) or France (35%) (Appendix 3, Table 19: % European Visitor Sources). In those cases where Asian visitors were part of the Aboriginal tourism market mix typically the largest share of visitors came from either China (33%) or Japan (31%) (Appendix 3, Table 20: % Asian Visitor Sources).

Length of stay at Aboriginal tourism businesses varied according to the type of operation. Overall, the largest proportion (54%) of them visited for 4 hours or less. Amongst those staying overnight, the average visit was for 3.59 nights (Appendix 3, Table 21: Length of Visit). The vast majority (82%) of the tourism businesses reported that 25% or less of clients were gained from travel trade sources (Appendix 3, Table 22: % of Clientele Generated by Travel Trade).

2.6 Business Operating Characteristics

2.6.1 Operating Periods

On average Aboriginal tourism businesses surveyed had operated for approximately 17.2 years. The largest proportion of them (56%) had operated for more than 12 years, and a sizeable portion (28%) had been in operation for 5 years or less (Appendix 3, Table 23: Business Age Distribution). The median age of the reporting businesses was 19 years.

While about 61% of the businesses claimed to operate year round, highest levels of activity for most operations (80%+) occurred during the months of June through September. July and August were flagged by the operators (75%+) as being the best revenue producing months (Appendix 3, Table 24: Months of Operation).

2.6.2 Employment and Revenue Performance

On average, the businesses employed about 8.07 full-time year round (i.e., full-time is working more than 20 hours per week) and another 7.48 full-time peak season employees. About half (53%) or 4.25 of the full-time year round, and approximately 70% or 5.25 full-time peak season employees were Aboriginal. These were complemented by additional part-time year round (i.e., part-time is working less than 20 hours per week) (7.87) and peak season (3.66) workers. About 17% or 1.35 of the part-time year round, and 86% or 3.13 of the part-time peak season were Aboriginal employees (Exhibit 2-6).

Exhibit 2-6: Business Employment Staffing Summary

Job Type	All Year Round	All Peak Season	Aboriginal Year Round	Aboriginal Peak Season	Aboriginal % Year Round	Aboriginal % Peak Season
Full Time	8.06	7.48	4.25	5.25	53	70
Part Time	7.87	3.66	1.25	3.13	17	86

Overall about two-thirds (67%) of the businesses reported that their operations were managed or directed by Aboriginal personnel.

Aboriginal tourism businesses reported relatively positive performances over the past three years. About 72% of them either made a profit or broke even in 2013. Given that a sizeable proportion of the enterprises were not-for profit operations, these results were favourable (Appendix 3, Table 25: Business Sales/Revenue Performance in 2013). Furthermore, about 92% of the businesses indicated that over the past three years their revenues/sales had either remained the same or increased (Appendix 3, Table 26: Business Sales/Revenue Performance for Past 3 Years). While revenues per business averaged around $369,000 annually, less than 12% of the respondents claimed to have earned revenues in excess of $500,000 annually (Appendix 3, Table 27: Tourism Revenue Distribution (less than $500,000)and Table 28: Tourism Revenue Distribution (greater than $500,000)).

2.7 Growth Prospects and Challenges

2.7.1 Growth Prospects

The Aboriginal operators were generally optimistic (87%) about business growth prospects over the next 3 years. On a scale ranging from 1=very pessimistic to 4=very optimistic, Aboriginal tourism operators provided an average rating of 3.36. They felt that such growth was most apt to be associated with visitation levels, revenues, and further cultural tourism experience development (Exhibit 2-7).

Exhibit 2-7: Anticipated Business Growth Areas

	Not at all	Increase Somewhat	Increase a lot	NA	Average*
More visitors during peak season	3%	54%	42%	1%	2.39
More visitors during non-peak season	15%	54%	20%	11%	2.06
More revenues	2%	61%	33%	4%	2.32
More staffing	17%	64%	12%	7%	1.94
More amenities and / or services	9%	60%	28%	4%	2.20
More cultural experiences	7%	52%	36%	4%	2.30
More infrastructure building improvements	17%	49%	29%	5%	2.12

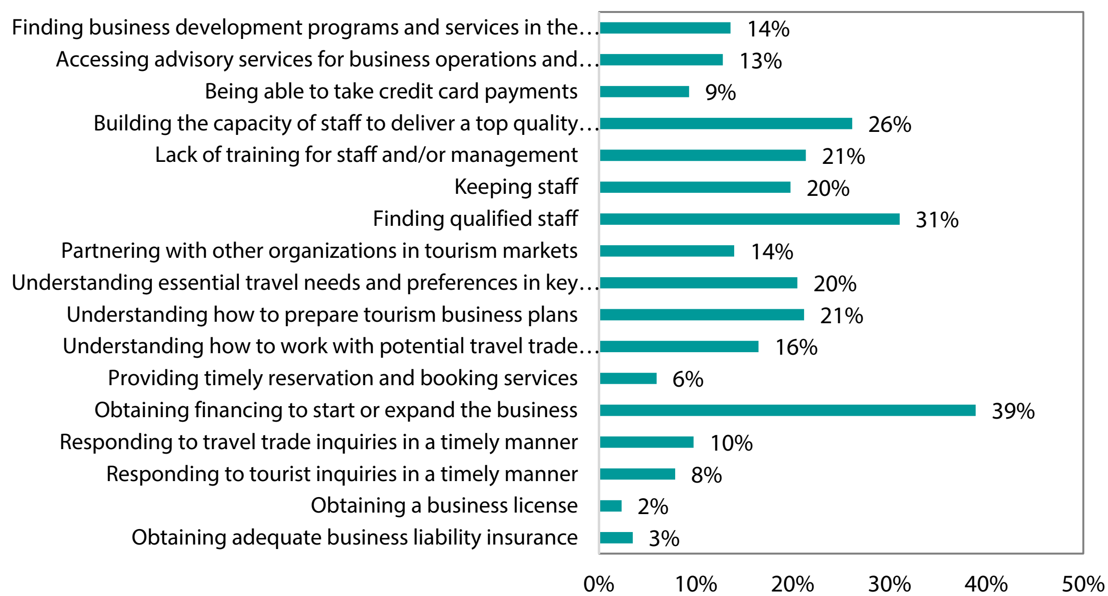
**Average score based on scale ranging from "1=not at all" to "3=increase a lot"*

More than half of them indicated that their business plans included greater investments in new cultural experience (71%), expanded infrastructure (58%), staff training (56%), and new amenities and services (55%) (Appendix 3, Table 29: Future Tourism Investment Plans).

2.7.2 Growth Challenges

Several important business and destination development issues were identified by Aboriginal tourism operators as being quite challenging to growth prospects for their businesses. From a business operations perspective the most frequently cited constraints to growth were accessing adequate funding (39%), and finding and retaining qualified staff (31%) (Exhibit 2-8).

Exhibit 2-8: Growth Challenges



They also flagged several important regional destination development constraints that were holding back their business growth prospects 'quite a lot'. These were primarily related to a combination of transportation issues limited air, water and road access to their business locations (Appendix 3, Table 30: Destination Development Factor Importance).

3 Travel Trade Aboriginal Tourism Survey Perspectives

The following sections provide information concerning travel trade perspectives on the capacity, development opportunities and challenges for Aboriginal tourism in Canada. This information is derived from a survey of travel trade operators conducted in the fall of 2014. The respondents are a sample of travel trade operators taken from a larger pool of travel trade representatives invited by ATAC members to participate in the survey. Given the self-selective nature of the sample, the perspectives are not necessarily representative of all travel trade operators currently conducting or interesting in pursuing partnerships with Aboriginal tourism businesses in Canada. However, it does offer the insightful perspectives of a select group of travel trade operators considered by Aboriginal tourism organizations to be influential in shaping current and future opportunities for Aboriginal tourism growth.

3.1 Travel Trade Operators Profile

Overall, 36 travel trade operators participated in this survey. While a strong majority of them (86%) operated from locations in Canada (primarily Quebec and BC), the remaining respondents conducted their businesses from Europe (especially Germany). They tended to conduct multiple travel trade activities. Most prominent were receptive (65%), inbound (54%), and incentive (35%) travel services (Appendix 4, Table 31: Travel Trade Business Services). The reach of their activities varied by company, but collectively extended across Canada. However, most of the businesses had presence in Quebec (86%), British Columbia (81%), Ontario (79%) and Alberta (79%) (Appendix 4, Table 32: Provinces in Travel Trade Company Itineraries). The vast majority (89%) of them included Aboriginal culture content in their tour packages. Similarly, the largest share of the travel trade operators had integrated Aboriginal culture into their tour itineraries for more than 5 years (Appendix 4, Table 33: Years Aboriginal Content in Travel Trade Itineraries).

3.2 Extent of Aboriginal Cultural Inclusion

For most of these travel trade businesses (75%), Aboriginal tourism was positioned not as the primary focus, but rather as an important part of a broader multi-activity package experience. On average, they incorporated Aboriginal cultural tourism on 1.85 days of the total tour package days. Overall, a median of 1 day of Aboriginal content in broader tour packages was included.

3.3 Aboriginal Cultural Tourism Competitiveness

Based on their awareness of Aboriginal cultural tourism in Canada and abroad, the travel trade respondents offered their views on the competitiveness of current Canadian offerings. Overall, their views were generally favourable. On a scale ranging from 1 meaning much worse to 4 being much better, their overall average evaluation was 3.14 or 'somewhat better'. They perceived Canada's Aboriginal tourism offerings to be most competitive with respect to product authenticity (avg. 3.81), customer service levels (3.30) and the quality of travel trade partnerships (3.24). Conversely, their perceptions of consumer awareness of Canada's Aboriginal tourism products and services were much less favourable (avg. 2.7) (Exhibit 3-1).

Exhibit 3-1: Perceived Canadian Aboriginal Tourism Global Competitiveness

Comparison Items	Competitive Rating	# of Companies
Diversity of products available	3.24	33
Quantity of products available	2.97	33
Product authenticity	3.81	33
Customer service levels	3.30	33
Meeting visitor demand for the kinds of products/services	3.17	32
Meeting basic market/export ready standards	2.85	32
Quality of partnerships with travel trade	3.24	33
Consumer awareness of product/services	2.70	33
Branding of product/services	2.97	33
Price for value	3.10	33
		n=33
Avg rating = 2.7		

Travel trade representatives also pointed out those actions they felt necessary to ensure continued competitiveness and growth for Aboriginal cultural tourism in Canada. On a rating scale ranging from 1 meaning not at all important to 5 being very important, they identified increasing travel trade relationships (avg. 4.64) and product market-readiness (avg. 4.61), as well as ensuring the implementation of sound authenticity practices (avg. 4.55) as being of highest priority (Appendix 4, Table 34: Competitiveness Factors Shaping Canadian Aboriginal Tourism Growth).

3.4 Aboriginal Cultural Tourism Demand

Travel trade operators were more optimistic about demand for Canadian Aboriginal cultural tourism experiences as opposed to more general global growth in this market niche. On a scale of 1 meaning demand would decrease a lot to 5 suggesting it would grow a lot, Canada's rating was higher (avg. 3.84) than those offered for global prospects (avg. 3.69). However, in both cases the ratings suggest moderate as opposed to dramatic growth in demand.

In keeping with the preceding views, they were cautiously optimistic about the possibility that their companies would add more Aboriginal cultural content to their respective tour portfolio over the next five years. On a scale ranging from 1 meaning none at all to 3 indicating a lot of new Aboriginal products would be added, the respondents averaged a rating of 2.13 (a little).

Companies that suggested they would add a little or a lot of additional Aboriginal cultural aspects to their tour packages also indicated the types of cultural offerings they would probably incorporate. Those most frequently mentioned included: attractions such as interpretive centres (76%), Aboriginal guided outdoor and adventure experiences (68%), and cultural tours (64%) (Exhibit 3-2).

Exhibit 3-2: Tour Package Additions / Improvements

Improvement Factors	% of Companies	# of Companies
Accommodation-based products	57.6%	19
Attraction-based products (e.g., interpretive centre/site, museum, art gallery)	75.8%	25
Event-based products (e.g., pow-wow, performances, rodeos, traditional games)	42.4%	14
Outdoor and adventure-based products (e.g., guided fish and wildlife viewing, boat tours, trail rides)	63.6%	21
Food and beverage-based products	42.4%	14
Retail product	6.1%	2
Cultural interpretive products (e.g., tours, cultural tours or lectures, interpretive displays, informational signs)	63.6%	21
Don't Know/No Response	9.1%	3
Other (please specify)		3
		n=33

3.5 Future Strategies

Travel trade operators also offered their ‘top of mind’ priority actions for increasing the competitiveness of Aboriginal cultural tourism in Canada. In many ways they reinforced perspectives noted in other parts of the survey. Top priorities were placed on ensuring the market and export readiness of existing products and services, increasing domestic and international market awareness of and exposure to existing Aboriginal cultural opportunities, and escalating partnerships and programs with travel trade operators. More detail on the actions suggested is provided in Appendix 3, Table 35: ’Top of mind’ practices for improving Canadian Aboriginal tourism.

Additional commentary about the future of Aboriginal tourism development in Canada was voiced by the travel trade respondents. The general sentiment was that there was a strong need to introduce potential international markets to the authentic, unique and localized dimensions of Aboriginal cultural tourism (e.g., language, music, food, customized). This would require working more closely with travel trade ‘champions’ ready to convey these dimensions to key travel markets. These champions would ideally involve a combination of Aboriginal Tourism Association stakeholders working in close partnership with travel trade representatives. To do this, significant support funding would help reduce the direct costs of delivering the message (Appendix 4, Table 36: Other “Top Of Mind’ perspectives on Canadian Aboriginal tourism strategy).

4 Interviews

Interviews were conducted with every ATAC member, provincial and national DMO research and product development professional across the country. As well, we interviewed other key informants in government, both federal and provincial/territorial departments and ministries, that have Aboriginal or tourism mandates, and with regional economic development agencies, such as Western Diversification, CanNor, FedNor and ACOA. The interviews focused on collecting relevant, past research and opinions related to growth challenges/barriers and opportunities. More than 60 professional were interviewed. The list of interviews is provided in APPENDIX 1: Interviewee / Contact List. A summary of barriers and opportunities is provided below.

4.1 Aboriginal Tourism Association of Canada Member Interviews

ATAC member interview discussions focused on identifying issues constraining Aboriginal tourism, emerging trends, key initiatives, and where respondents felt weaknesses, threats and opportunities exist. Regions where no RATA exists have Aboriginal tourism industry representatives participating in ATAC.

Issues and Industry Constraints

In 2002 when the previous National Aboriginal tourism study was conducted, there was nine established Regional Aboriginal Tourism Associations with Saskatchewan just launching; each province and territory had an Aboriginal tourism organizing body (New Brunswick, Nova Scotia, Newfoundland/Labrador, and Prince Edward Island joined to create on Atlantic organization). Today, seven provinces are without a regional Aboriginal tourism organization. ATAC members reported the absence of a coordinating body poses difficulties to support growth in Aboriginal tourism in their regions. Without resources, they are without capacity and mandate to service existing businesses or new entrants. Further, the lack of this coordinating body means there is no mandate for them to advocate or for provincial and industry representatives to refer on Aboriginal tourism matters. Even with the absence of regional Aboriginal tourism organizations, there is communication between provincial government ministries and agencies with leading Aboriginal tourism people in the province; yet the magnitude of this communication is limited and often low existent with provincial tourism regional organizations.

Product development support too was raised as a constraint. Aboriginal tourism operators needed to understand what market-readiness is, how to operate to meet industry standards, and industry trends and emerging markets, plus be realistic about the tourism industry (not a get-rich quick industry).

Adding to the challenges encountered by Aboriginal tourism operators in market-readiness, is the lack of community and regional infrastructure needed to be competitiveness. For example, the internet and social media are important tools to promotion and consumer relation; however, there are still First Nation communities throughout Canada who do not have internet access and others that do not have reliable internet services.

Many Aboriginal tourism experiences are also micro and small businesses that are unable to accommodate large groups. Their location too, being too far from main transportation corridors and / or accessible by non-paved roads, is an impediment to large groups that travel by bus.

Adding to location challenges is that the majority of Aboriginal tourism experiences are away from airports, and especially international airports that are key arrival points for international visitors markets.

The costs of accessing and the price of the Aboriginal tourism experience essentially prices the Aboriginal tourism experience out-of-the-market. Understandably, Aboriginal tourism is perceived as a 'niche' product, and thus must ensure the experience is of high, consistent quality that is unique in comparison to other tourism experiences to justify the price.

While there has been an increase in the number of Aboriginal tourism experiences offering cultural experiences, there is still Aboriginal apprehension to share these cultural experiences, and for those willing, there is lack knowledge of how to package it for maximum appeal to the visitor. These cultural experiences are commonly offered through arts and crafts retail (galleries and gift shops), as well as through festivals and events; however, they are not generally accounted for in Aboriginal tourism inventories. Much of the Aboriginal tourism activities have focused on the larger tourism sectors or businesses, being outdoor adventure, attractions and accommodations.

There used to be a lot of funding support for Aboriginal tourism in Canada – for operating Aboriginal tourism organizations, and for First Nations and Aboriginal people wanting to plan and launch tourism businesses. The federal government was the primary agent of these programs, but has since reprioritized and devolved some programs to Aboriginal capital corporations. There is no longer a national funding support program for Aboriginal tourism organizations.

Aboriginal tourism operators also face similar operating concerns as the general tourism industry, such as the operating skills, industry knowledge, cost of insurance, short tourism season that relatively converts basic operating costs into high expenditures, industry sector constraints (e.g., high number of government permits requirements), and human resources / labour matters.

Canada has two official languages – English and French – and in Nunavut four official languages.[5] Much tourism research and studies are produced only in English, which means the information is inaccessible to Francophones, and to a large segment of the Nunavut population, and as well in northern Quebec where the primary languages Inuktituk and Cree.

[5] Nunavut has four official languages of which two are Inuit (Inuktitut and Inuinnaqtun).

Further, tourism may not be a priority in areas where other industries are booming offering high wages, creating difficulty for the business to attract and retain labour. For Aboriginal communities, land claims too may obstruct tourism growth.

Linking with the travel trade requires the travel trade is confident in the Aboriginal tourism product. Improvements have been made with more experiences understanding and implementing market-ready industry standards, and consequently being included in the travel trade packages. However, the system for booking these Aboriginal experiences is still underdeveloped.

The domestic visitor remains the largest market for Aboriginal tourism in Canada, while international visitors continue to be an important market segment. Key markets recognized are Germany, United Kingdom, Switzerland, with Asian markets emerging. Markets differ for Quebec, with France being one of their key markets. In Nunavut, it is felt Brazil is a budding market.

4.2 Key Government Informant Interviews

Other key informant interviews were federal government and regional economic development agencies that are involved in tourism-related activities, or initiatives that benefit Aboriginal tourism. Discussions focused on program initiatives and experience working with Aboriginal tourism, ideas on opportunities, and areas where strengthening is needed.

Government of Canada's Aboriginal Affairs and Northern Development Canada (AANDC) department is the lead and coordinating federal organization in Aboriginal tourism, including the funding of this research project. Its relationship with ATAC is solidified through MOU. It recognizes that more formalized relationships are needed, and thus acts as a coordinating body with other federal, regional and provincial agencies in activities related to tourism and Aboriginal economic development.

Regional economic development organizations have varying experience working with Aboriginal tourism. For example, Western Diversification has supported over 50 projects related to Aboriginal tourism in 10 years. These regional organizations' relationships with Aboriginal tourism is influenced by priorities set in the region and by the federal government, and are more often able to support Aboriginal tourism development within their current program compliment, or when specialty funding becomes available. CanNor and Parks Canada are working in partnership on a northern Aboriginal tourism parks initiative.

There is an estimated 20 million visitors a year to federal parks. Parks Canada manages 90% of Canada's federal land base, of which is located next to more than 300 First Nations. Parks is currently developing a strategy on Aboriginal tourism and economic development which includes development of Case studies on base practices in Aboriginal projects, Aboriginal tourism success stories, and ways to build capacity in the communities.

4.3 Barriers

Our interviews yielded the following challenges/barriers to growth of Aboriginal tourism in Canada.

- **Lack of organization and coordinated Aboriginal tourism approaches.**
  - There is a discrepancy between the Aboriginal tourism organizations and government in how each defines Aboriginal tourism.
  - The mandate for ATAC is not yet confirmed, and in regions where there was no Aboriginal tourism organization or group, there was no strategy or coordinated plan to develop Aboriginal tourism.
  - Without a central organization, there was no network to support new or young Aboriginal tourism businesses. While mature and well-established Aboriginal tourism businesses are often known to each other, there is no means for them to mentor new entrants.
  - There is a lack of resources to really 'kick start' operations and their regions. Providing support to enable full participation in and understanding of the tourism industry is needed for increased success of both new and existing Aboriginal tourism businesses.
  - Provinces / Territories that have established Aboriginal tourism organizations or groups easily produced reports, studies, plans, and lists of Aboriginal tourism businesses in their jurisdictions. Provinces that did not have a coordinating organization lacked confirmed definitions, lists and information.
  - There is a lack of linkages within the tourism industry. Lack of connections with influencers and decision makers weaken the ability of Aboriginal tourism to become established within their region and nationally.
- **Lack of market-readiness.** While much progress since 2002 has been made to support Aboriginal tourism businesses with becoming market-ready, there are still gaps between Aboriginal tourism businesses understanding what 'readiness' is and how to realize it. This is a role a regional Aboriginal tourism association can fulfill, with guidance and tools provided by a national organization.
- **Deficiency of a qualified workforce.** Similar to the tourism industry, finding qualified staff with good market knowledge is a key challenge for Aboriginal tourism businesses.
- **Availability of recent research.** Due to varying Aboriginal tourism definitions across the country and the lack of a sustained national organization, there is not a consistent measure of the size and value of Aboriginal tourism in Canada. Also, primary consumer research that examines key market demand, perceptions, characteristics and preferences is outdated.
- **Infrastructure challenges identified were similar to other tourism businesses.**
  - High cost of air transportation means that many remote or northern Aboriginal tourism businesses are too expensive for many tourist markets.
  - Cost of operating and liability insurance can be prohibitive.
  - Lack of roads and other community infrastructure can deter tourism development.
  - Small businesses are unable to accommodate tour buses or large groups.

- **Lack of community support is prominent.**
  - Differing economic priorities in areas where other resource industries are thriving, such as mining or oil and gas, it can make it difficult for tourism to be included in community strategies.
  - Tourism businesses find it difficult to find labour in regions where other industries (e.g., mining or oil and gas) offer higher wages and there's a demand for human resources. However, these high paying jobs may also provide the financial means and time for Aboriginal people to launch tourism businesses, especially in regions where outdoor cultural activities are part of the daily lives of the Aboriginal people.
  - There is the perception that once successful, local community support for tourism businesses and entrepreneurs evaporates.
  - Sometimes community cultural protocols are unclear or not established.
- **Language of preference barriers.** While Canada has two official languages (English and French), in some regions, such as Nunavut (four official languages), some businesses operate primarily in the owner's traditional language. As a consequence, access to industry information and services can be out of reach when it is not in a language the Aboriginal person uses. This is especially a barrier for Aboriginal and Indigenous tourism where research is scarce, and affects Quebec Aboriginal tourism operators, as well as Nunavut where there are four official languages of which two are Indigenous, and other Aboriginal tourism operators whose primary language is their traditional First Nation language.
- **Lack of Aboriginal cultural tourism product.** In some major urban centres in Canada (e.g., Toronto, Montreal) there is little or no authentic product. More high-quality, authentic products in major urban centres, especially those points that are considered 'gateway' entrance points, will raise awareness of Canadian Aboriginal tourism with travelers.
- **Limited access to business capital and support.** Similar to other tourism businesses, it can be challenging for Aboriginal tourism businesses to access funds for business development. In the 1990s and early 2000, there were many business funding programs available to First Nations and Aboriginal people, of which many provided grants and other support for feasibility studies, planning, startup and operating support. These grant programs often were paired with other Aboriginal business funding programs and lenders. Changes to the administration of these programs have meant there are fewer sources for Aboriginal businesses to access support.
- **Key market perceptions of injustice.** Major media coverage about unsettled land claims, missing women and other social inequities have led to discrepancies in consumer perceptions of Aboriginal people in Canada. This discrepancy leads to hesitant consumers that are unsure of what to expect when visiting an Aboriginal tourism business.

Overall, other than a few slight variances, perceptions of barriers/challenges of Aboriginal tourism growth were similar between Aboriginal tourism and other DMO professionals. Aboriginal tourism professionals commented more about the lack of organization and coordinated approaches to tourism development, while DMO professionals were more likely to remark about the lack of community support, availability of product in major urban areas, lack of products in urban areas, access to business capital and market perceptions of injustice.

Exhibit 4-1: Aboriginal Tourism Barriers to Growth

Barriers to Growth	Aboriginal Tourism Professionals	Key Government Informants	DMO Professionals
Lack of Organization/Coordinated Approach			
Inconsistent definition across country	✓		
Unclear ATAC mandate	✓		✓
No strategy for growth	✓	✓	
Lack of support for new businesses or associations	✓	✓	✓
Lack of linkages with the tourism industry	✓	✓	✓
Overall Lack of Market/Export Readiness	✓	✓	✓
Availability of Qualified Workforce (e.g., training, business leaders)	✓		✓
Availability of Recent Research			
Lack of supply-side research w/out organization (e.g., business lists)	✓		✓
Availability of recent market research	✓		✓
Competition with Other Industries			
Workforce goes where they can earn the most money	✓	✓	✓
More government support for other industries	✓	✓	✓
Industry Infrastructure			
Expensive air transportation	✓		
Expensive insurance	✓		✓
Poor roads/signage to businesses	✓		✓
Community Support			
Unclear cultural protocols			✓
Lack of community infrastructure – roads, services, internet	✓	✓	
Community leaders focused on other priorities (e.g., housing, sewer, water)			✓
Lack of support for successful businesses and entrepreneurs	✓		✓
First Nations Language Support (not English or French)	✓		
Availability of Aboriginal Tourism Product in Major Urban Areas			✓
Access to Business Capital	✓	✓	✓
Key Visitor Market Perceptions of Injustice Against Aboriginal People (e.g., land claims, missing women)			✓

4.4 Opportunities

Tourism professionals indicated that there were opportunities to grow Aboriginal tourism.

- Improve competitiveness through enhanced business development.
    - Aboriginal tourism business could seize opportunities to provide top-quality experiences by enhancing market and export readiness.
    - Develop partnerships with mainstream tourism businesses/associations and develop a network of Aboriginal tourism businesses.
    - Improve availability of training and development programs for the Aboriginal Tourism workforce. This includes training on customer service best practice, how the tourism industry works and cultural protocols. Also, improved leadership/management development training would provide opportunities to improve business leadership.

  - Develop partnerships with industry leaders, and increase presence at transportation gateways such as airports.
- Meet consumer demand through enhanced product development. There is consumer demand for Aboriginal tourism experiences that:
  - Are authentic;
  - Are unique, immersive, engaging;
  - Are experiential;
  - Involve learning;
  - Tend to be shorter than longer;
  - Are paired with wilderness, nature-based, soft/hard adventure;
  - Involve food (traditional);
  - Are events;
  - Involve arts and culture; and
  - Accessible in gateway communities/cities.
- Enhance livelihood for tourism businesses and local tourism economies:
  - Build support from local communities; and
  - Establish strong industry associations that could share success stories, develop mentorship programs and have sustained support (budget).
- Increase demand through marketing, specifically there are significant opportunities to:
  - Raise awareness of Canada as an Indigenous tourism destination;
  - Convert intent of visitors to actual visitation; and
  - Enhance positive word of mouth through outstanding experiences.

PART 2: INDUSTRY RESEARCH

This section provides an overview of the Canadian tourism industry (performance, market profiles and barriers to growth), followed by a synopsis of the secondary research available on Aboriginal tourism in Canada.

The section about Aboriginal tourism starts with a summary of the structure of the industry (supply side) followed by an overview of Aboriginal tourism traveler characteristics, a summary of Canada's competitors, and finally barriers to growth.

5 Global Tourism Industry

Tourism is a cornerstone of the global economy. Despite declines in tourism from the world economic downturn in 2008/09, global international tourist arrivals have grown from 529 million in 1995 to over 1 billion in 2013. Continued growth, especially from emerging destinations is expected over the next two decades. The United Nations World Tourism Organization (UNWTO) forecasts that global international tourist arrivals will reach 1.8 billion in 2030 (3.3% annual growth). Growths from emerging economies (+4.4% annual growth) like Asia/Latin America/Central and Eastern Europe will surpass growth from established economies (+2.2% annual growth) like, Western Europe and North America[6].

5.1 Canadian Tourism Industry

5.1.1 Overall Performance

Over the past decade, there has been steady growth in the economic performance of the Canadian tourism industry. Economic indicators include:[7][8]

- In 2013, tourism accounted for 618,000 jobs in Canada and over 170,000 tourism business establishments;
- International tourism revenues accounted for $16.4 billion in 2013; and
- In 2012, tourism GDP was $32.3 billion increasing by 4% from 2011 and 13% from 2007. In 2012, tourism was 1.8% of Canada's total GDP and was estimated to grow to 2.0% of total GDP in 2013.

Despite this growth, between 2004 and 2011, there have been declines in international overnight trips to Canada (except in 2010 which may be partially due to the 2010 Winter Olympics in Vancouver, BC). Declines have resulted from global events including a stronger Canadian dollar, the SARS epidemic, terrorism events resulting in angst in border security and traveler safety, and the 2008/09 economic downturn.

Recently, overnight international visitor arrivals have returned to a growth situation. Canada welcomed 16.6 million overnight visitors in 2013, up 1.5% from 2012. Just over 12 million or 72% of those were from the United States. Other core international markets include the United Kingdom, Germany and Australia. Markets of

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[6] United Nations World Tourism Organization (2014). UNWTO Tourism Highlights 2014 Edition. United Nations World Tourism Organization.

[7] Canadian Tourism Commission (2013). Helping Tourism Businesses Prosper. Canadian Tourism Commission 2013 Annual Report. Canadian Tourism Commission.

[8] Canadian Tourism Commission Market Research and Evaluation (2013). Tourism Snapshot 2012 Year-in-Review. Facts & Figures 7th Edition. Canadian Tourism Commission.

emerging/transitional interest are Japan, South Korea, Mexico, Brazil, China and India. China saw exceptional growth of 22% in 2013.

In terms of domestic tourism, in 2013 Canadians made 110.5 million overnight trips, this was up marginally (0.4%) from 2012. While in 2013, domestic travel expenditures decreased by 4% from 2012 but were up by 1% from 2011.[9] Statistics Canada changed methodology for measuring domestic travel in 2011; therefore statistics on performance prior to 2011 are not available.

Exhibit 5-1: Visitor Volume by International Market[10]

International Market	Overnight Visitors (2013)	% Change (2013/2012)	Visitor Spending (2013) $ Million	% Change (2013/2012)
United States	12,007,976	1.0%	NA	NA
United Kingdom	645,697	-1.3%	$787.8	0.4%
France	459,475	0.9%	$537.4	1.4%
China	352,597	22.3%	$603.2	24.2%
Germany	311,379	-0.1%	$420.8	1.0%
Australia	264,207	2.4%	$397.8	1.2%
Japan	224,858	-0.6%	$302.4	-3.1%
Mexico	150,896	6.3%	$215.7	10.8%
India	147,099	0.3%	$171.3	-0.8%
South Korea	144,583	3.3%	$246.6	5.4%
Brazil	93,757	0.2%	$160.0	5.2%

Despite these recent increases in international visitor arrivals**,** Canada has not kept pace with its competitors. Canada's market share of global international tourism arrivals has declined from 2.8% in 2000 to 1.5% in 2013[11]. Further, although Canada remains amongst the top twenty of most visited countries, in terms of international visitor arrivals, it has slipped from eighth place in 2000 to seventeenth in 2013[12]. These declines in international arrivals are statistically off-set by growth in domestic tourism and have resulted in an increasing dependence on domestic travelers. National, tourism receipts have also declined significantly, (e.g., about 26% (2007 constant dollars) between 2000 and 2012).

5.1.2 Performance by Province

In 2013, Ontario had the highest share of both domestic trips and international visitors. Quebec had the second largest share of domestic trips while British Columbia ranked second greatest for international visitors. The share of international visitors is dependent on visitor arrivals. It is highest in Ontario and British Columbia due primarily to the large number of flights arriving at gateway airports in these provinces. Both Alberta and Quebec had

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[9] Statistics Canada. Table 426-0025 - Travel survey of residents of Canada, domestic trips, expenditures and nights, in Canada, by traveler characteristics and trip duration, annual (person-trips unless otherwise noted), CANSIM (database). (Accessed: 2014-11-26).

[10] Canadian Tourism Commission Market Research and Evaluation (2013). Tourism Snapshot: A focus on the markets in which the CTC and its partners are active. December 2013. Volume 9, Issue 12. Canadian Tourism Commission and Canadian Tourism Commission (2014). Helping Tourism Businesses Prosper. Canadian Tourism Commission 2013 Annual Report. Canadian Tourism Commission.

[11] HLT Advisory (2014). 2014 Gateway to Growth Annual Report on Canadian Tourism: Focus on the USA Market. Report for the Tourism Industry Association of Canada.

[12] HLT Advisory (2014). 2014 Gateway to Growth Annual Report on Canadian Tourism: Focus on the USA Market. Report for the Tourism Industry Association of Canada.

much higher shares of domestic trips than international visitors. Similarly, Manitoba, Newfoundland/Labrador, Nova Scotia and Saskatchewan had slightly higher shares of domestic trips than international visitors.

Exhibit 5-2: Overnight Visitor Volume by International Market[13,14]

	Domestic Trips		International Visitors	
	2013 (000's)[1]	% of Total	2013 (000's)[2]	% of Total
Alberta	12,359	11%	884	5%
British Columbia	14,682	13%	4,417	27%
Manitoba	3,481	3%	208	1%
New Brunswick	2,340	2%	366	2%
Newfoundland/Labrador	1,561	1%	52	0%
Nova Scotia	3,273	3%	191	1%
Ontario	42,763	39%	7,774	47%
Prince Edward Island	572	1%	2	0%
Quebec	26,566	24%	2,438	15%
Saskatchewan	4,683	4%	101	1%
Yukon/Nunavut	NA	NA	158	1%
**The sum of the provinces does not equal the Canadian total because travelers make visits to multiple provinces on one trip.*				

5.2 Market Profiles[15]

Characteristics of the Canadian, American, the Canadian Tourism Commission's core overseas markets (United Kingdom, France, Germany and Australia) and emerging/transition markets (Japan, South Korea, Mexico, Brazil, China and India) are summarized in this section.

5.2.1 Canada

Compared to the overall economies of the United States and Europe, Canada has performed relatively well over the past decade. Consequently, Canadians have continued to be frequent travelers spending $35.2 billion on overnight trips outside of the country in 2013. Spending on international travel has almost doubled since 2005 and Canada ranked seventh in international tourism expenditures. Interestingly, in 2013, Canadians took more pleasure trips to the United States than within Canada.

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[13] Domestic Trips: Statistics Canada. Table 426-0026 - Travel survey of residents of Canada, province visits, expenditures and nights, by province visited, trip characteristics and visit duration, annual.(accessed: November 20, 2014).

[14] International Visitors: Statistics Canada. Table 427-0004 - Number of international tourists entering or returning to Canada, by province of entry, monthly (persons) (accessed: November 18, 2014).

[15] There are five main sources of information for this section including:

1. United Nations World Tourism Organization (2014). UNWTO Tourism Highlights 2014 Edition. United Nations World Tourism Organization.
2. The Canadian Tourism Commission Global Tourism Watch Studies.
3. Canadian Tourism Commission (2014). Helping Tourism Businesses Prosper. Canadian Tourism Commission 2013 Annual Report. Canadian Tourism Commission.
4. Canadian Tourism Commission Market Research and Evaluation (2013). Tourism Snapshot 2012 Year-in-Review. Canadian Tourism Commission
5. Canadian Tourism Commission Market Research and Evaluation (2014). Tourism Snapshot September 2014. Canadian Tourism Commission.

Overall, in 2013 there were 112.3 million trips by Canadians in Canada. These trips resulted in expenditures that exceeded $28 billion. Domestic tourism accounted for more than 85% of overnight visitation in Canada. The Canadian Tourism Commission estimates the total target market size in 2013 to be about 14.2 million travelers. Moving forward, the recent devaluation of the Canadian dollar may cause an increase in Canadian domestic tourism and reduce international travel by Canadians.

5.2.2 United States

Visitors from the United States (USA) represent Canada's largest international market.

- Canada saw significant declines in the number of American overnight travelers between 2002 and 2009, since the surge in 2010 for the Winter Olympics, there have been small but steady increases in visitors.
- In 2012-13, the USA saw modest economic recovery with gains of 2-3% in GDP. In 2013, the USA accounted for the second highest international travel expenditures in the world (behind China).
- Total overnight trip from the USA was up by 1% in 2013 over 2012. Year-to-date 2014 (September), showed a virtually flat, 0.3% growth.
- The Canadian Tourism Commission estimates the United States target market size to about 63.3 million (for 2 years – those that show interest in visiting) with about 33.6 million (53%) considered to be the immediate potential (will definitely or very likely to actually take a trip to Canada).
- On average, while in Canada, USA overnight travelers visited for 4.3 nights and spent $533 per trip.
- The majority of American visitors visited Canada for pleasure (52%) or visiting friends and relatives (25%).
- More than half (60%) of American visitors are more than 45 years old and there is an even split between male and female visitors.

Exhibit 5-3: United States Market Characteristics

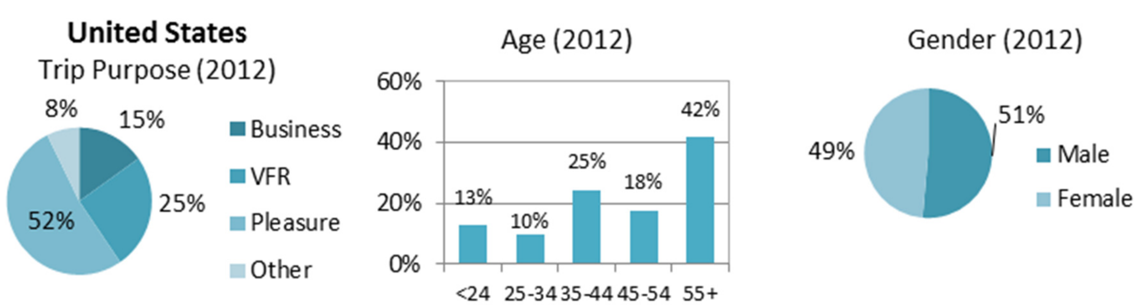
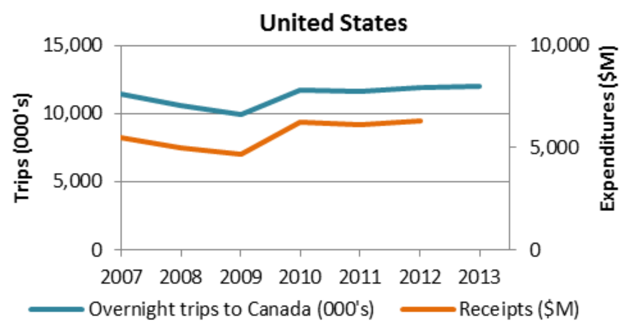


Exhibit 5-4: United States Visitor Volume and Expenditures



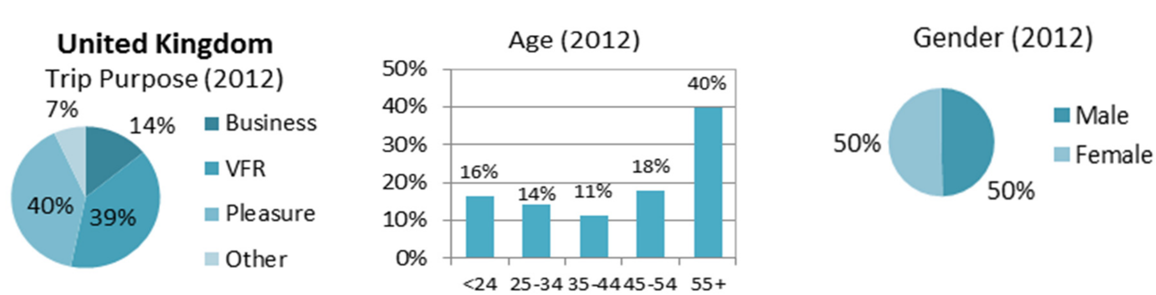
5.2.3 Core Overseas Markets

United Kingdom

Visitors from the United Kingdom (UK) represent Canada's largest overseas market.

- Canada has seen significant declines in the number of overnight travelers from the United Kingdom since the peak in 2007.
- Declines have been a result of the global economic crisis and the United Kingdom's slow recovery.
- Total overnight trips from the United Kingdom were down by 1% in 2013 from 2012. Year-to-date 2014 (September), showed moderate, 4.6% growth.
- The Canadian Tourism Commission estimates the United Kingdom target market size to about 16.5 million (for 2 years – those that show interest in visiting) with about 4.9 million (30%) considered to be the immediate potential (will definitely or very likely to actually take a trip to Canada).
- On average, while in Canada, United Kingdom overnight travelers visited for 13.9 nights and spent $1,314 per trip.
- More than three-quarters of United Kingdom visitors were in Canada for pleasure (40%) or visiting friends and relatives (39%).
- More than half (58%) of United Kingdom visitors are more than 45 years old and there is an even split between male and female visitors.

Exhibit 5-5: United Kingdom Market Characteristics

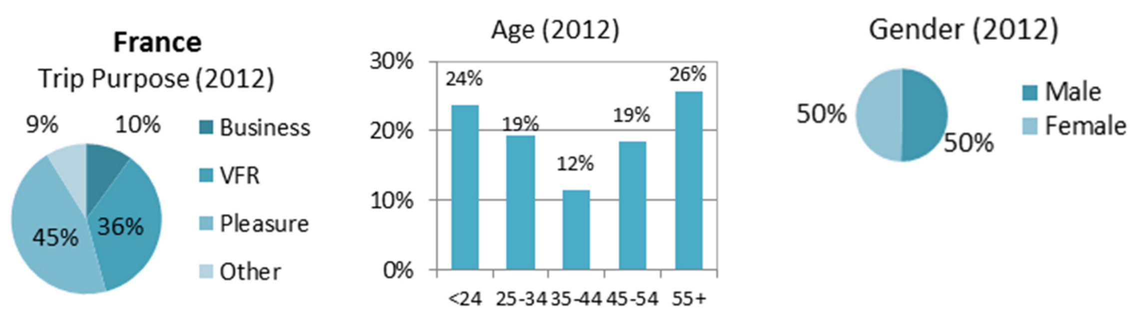


France

Visitors from the France represent Canada's second largest overseas market.

- Canada has seen slight growth in the number of overnight travelers from France since a small peak in 2010.
- Despite flat economic growth, the number of outbound travelers from France has slightly increased of late. In 2013, France ranked sixth (just ahead of Canada) for total travel international travel expenditures.
- Total overnight trips from France were up by 1% in 2013 from 2012. Year-to-date 2014 (September), showed moderate, 4.5% growth. August 2014 was a peak for French visitors since 1990.
- The Canadian Tourism Commission estimates the French target market size to about 13.6 million (for 2 years – those that show interest in visiting) with about 5.8 million (43%) considered to be the immediate potential (will definitely or very likely to actually take a trip to Canada).
- On average, while in Canada, French overnight travelers visited for 16.7 nights and spent $1,256 per trip.
- More than three-quarters of French visitors were in Canada for pleasure (45%) or visiting friends and relatives (36%).
- Less than half (45%) of French visitors are more than 45 years old and there is an even split between male and female visitors.

Exhibit 5-6: France Market Characteristics



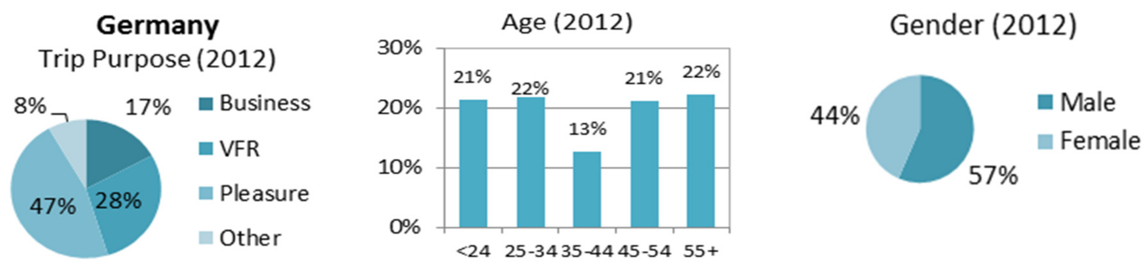
Germany

Visitors from the Germany represent Canada's third largest overseas market.

- Canada has seen slight declines in the number of overnight travelers from Germany since a small peak in 2010.
- Outbound travel by Germans ranked third in the world in 2013, behind China and the United States, this was up 2.3% from 2012.
- Total overnight trips from Germany were flat in 2013 from 2012. Year-to-date 2014 (September), showed strong growth (6.5%).

- The Canadian Tourism Commission estimates the German target market size to about 14.5 million (for 2 years – those that show interest in visiting) with about 6.0 million (41%) considered to be the immediate potential (will definitely or very likely to actually take a trip to Canada).
- On average, while in Canada, German overnight travelers visited for 17.4 nights and spent $1,506 per trip.
- Almost three-quarters of German visitors were in Canada for pleasure (47%) or visiting friends and relatives (28%).
- Less than half (44%) of German visitors are more than 45 years old and there are more male (57%) than female (44%) visitors.

Exhibit 5-7: Germany Market Characteristics



Australia

Visitors from the Australia represent Canada's fifth largest overseas market.

- Canada has seen moderate growth in the number of overnight travelers from Australia since declines in 2009.
- Australia's strong economy and dollar have led to strong growth in outbound travel. In 2013, Australia was ranked 8th (just behind Canada) in international tourism expenditures.
- Total overnight trips from Australia were up by 2.4% in 2013 from 2012. Year-to-date 2014 (September), showed strong growth (5.8%).
- The Canadian Tourism Commission estimates the Australian target market size to about 6.5 million (for 2 years – those that show interest in visiting) with about 2.4 million (37%) considered to be the immediate potential (will definitely or very likely to actually take a trip to Canada).
- On average, while in Canada, Australian overnight travelers visited for 15.6 nights and spent $1,791 per trip.
- About two-thirds of Australian visitors were in Canada for pleasure (62%) or visiting friends and relatives (4%).
- About half (54%) of Australian visitors are more than 45 years old and there is more female visitors (55%) than male visitors (45%).

Exhibit 5-8: Australia Market Characteristics

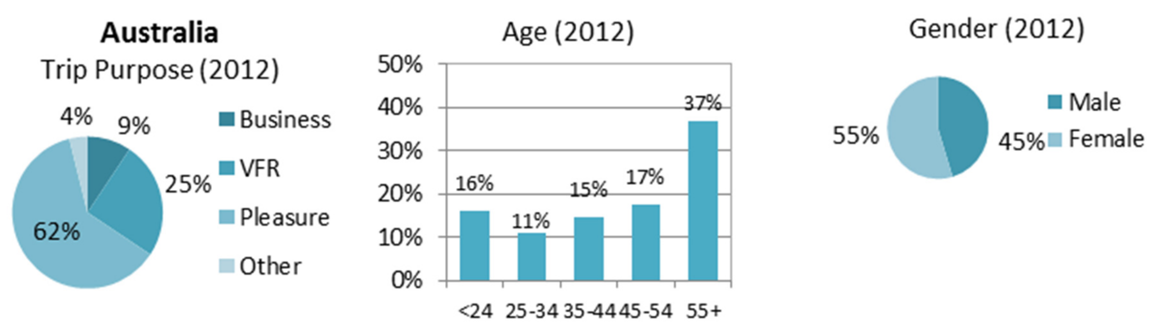
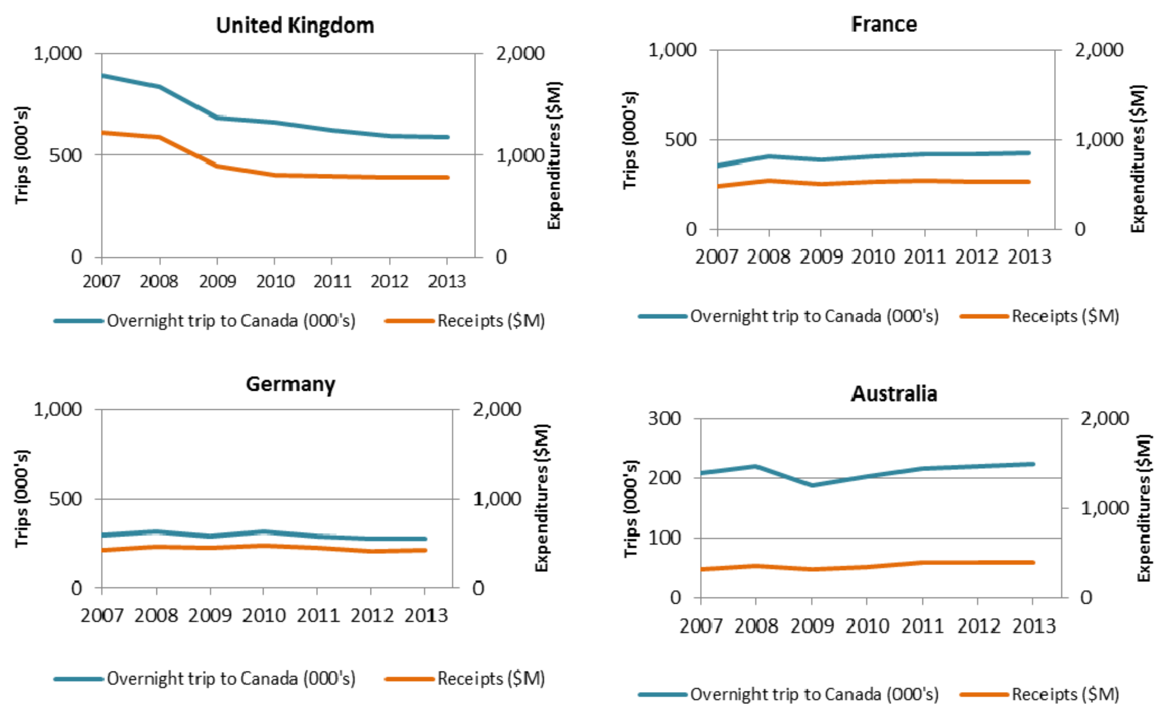


Exhibit 5-9: Visitor Volume and Expenditures over Time by Core International Market



5.2.4 Emerging/Transition Markets

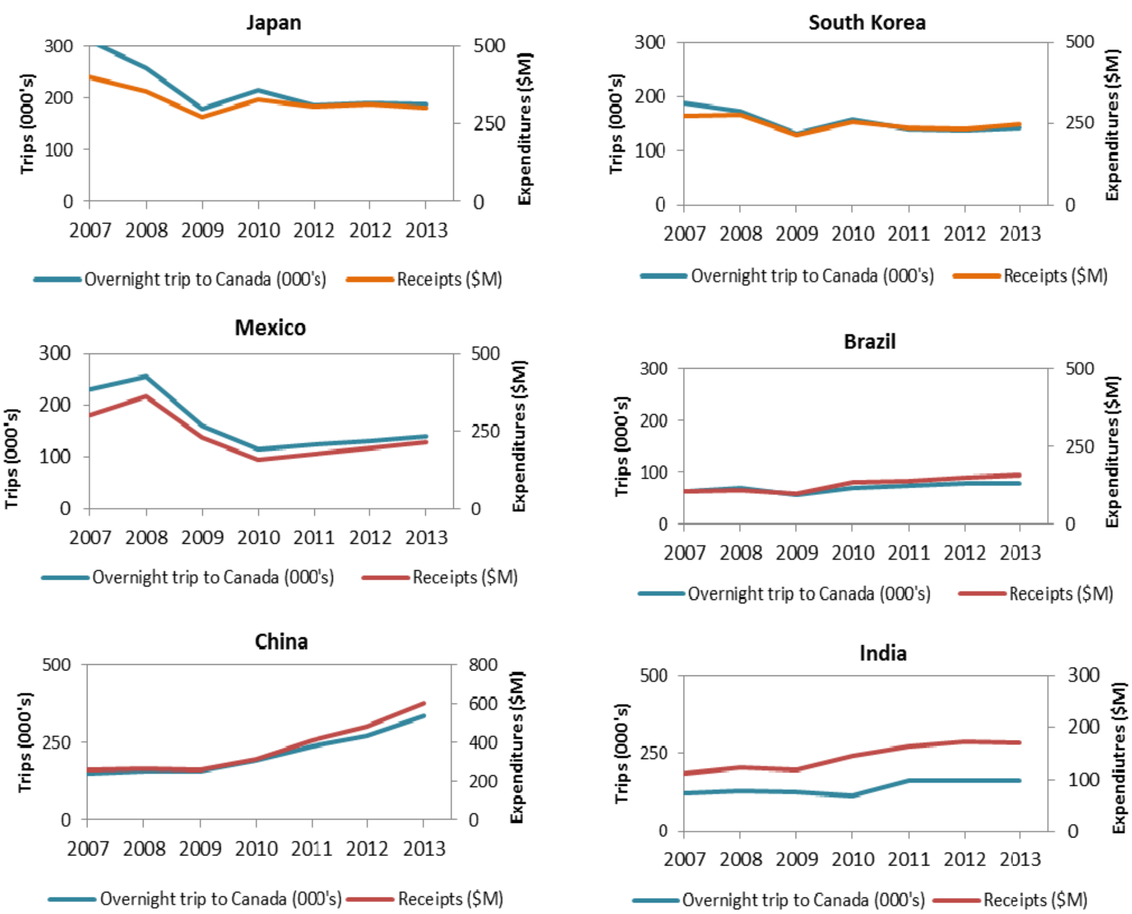
The UNWTO forecasts that most outbound tourism growth will occur from emerging economies. With the most promise for growth are known as the 'BRIC', including Brazil, Russia, India and China. In fact, over the next decade, the UNWTO expects outbound tourism growth rates that exceed 4%.

The Canadian Tourism Commission designates Japan, South Korea, Mexico, Brazil, China and India as emerging or transition markets. Since 2007, tremendous growth has been seen form the Chinese, Indian and Brazil markets. Year-to-date 2014 (September), the number of overnight trips has demonstrated strong (Brazil, Japan and South Korea) to remarkable (China, India) from all emerging/transition markets. Although growing, the Chinese market still represents just under 3% of all international overnight trips to Canada.

Exhibit 5-10 Growth in Overnight Trips from Canada's Emerging/Transition Markets[16]

Market	Overnight Trips: Percent Change (2013/ 2007)	Overnight Trips: Percent Change (2014/2013 Sept. YTD)
Japan	-39%	14%
South Korea	-24%	11%
Mexico	-39%	14%
Brazil	23%	5%
China	122%	29%
India	36%	21%

Exhibit 5-11: Visitor Volume and Expenditures over Time by Emerging/Transition International Market[17][18]



[16] Canadian Tourism Commission Market Research and Evaluation (2013). Tourism Snapshot August 2014. Canadian Tourism Commission.

[17] Domestic Trips: Statistics Canada. Table 426-0026 - Travel survey of residents of Canada, province visits, expenditures and nights, by province visited, trip characteristics and visit duration, annual.(accessed: November 20, 2014).

[18] International Visitors: Statistics Canada. Table 427-0004 - Number of international tourists entering or returning to Canada, by province of entry, monthly (persons) (accessed: November 18, 2014).

5.3 Barriers to Growth

5.3.1 Consumer Barriers

The Canadian Tourism Commission's Global Tourism Watch Studies examine why travelers choose not to visit Canada. Travelers from top markets have identified that the cost (expensive), that there were other places to visit or there was no real reason to visit Canada.

These barriers result in opportunities to use marketing dollars to persuade travelers that:

- The outstanding experiences are worth the cost of travel to/within Canada; and
- Now is the time to visit Canada, creating a sense of urgency to visit.

Exhibit 5-12: Traveler Barriers for Visiting Canada[19]

	Top Barrier	Second Barrier	Third Barrier
Canada	Expensive	Poor weather	Live in Canada
United States	Other places to visit	Too expensive	No real reason to go
United Kingdom	Too expensive	Other places to visit	No real reason to go
France	Too expensive	Other places to visit	Too far
Germany	Too expensive	Other places to visit	No real reason to go
Australia	Too expensive	Other places to visit	No real reason to go

5.3.2 Destination Development Barriers

In 2014, the Tourism Industry Association of Canada identified four key challenges to Canada's tourism competitiveness.[20]

1) **Marketing** – Strong national marketing campaign work is needed. Connecting with Americans will have the most immediate and significant impact.
2) **Access** – Aviation costs and visitor documentation are some of the biggest barriers for travelers. TIAC recommends a number of actions, the first is to review of the review competitiveness of Canada's cost structure of air transportation and continue to pursue strategic air access agreements. Also to modernize the visitor visa application process by streamlining the process (cutting red-tape) and investing in infrastructure to assist application procedures.
3) **Product** – Tourism products that drive international visitation such as parks, festivals and attractions should be investment priorities.
4) **People** – Federal labour programs should reflect the unique nature of the industry.

Similarly, a recent report by Deloitte indicated that the Canadian tourism industry is united in the belief that to become more competitive and increase tourism market share, Canada needs to act with respect to:[21]

- Reducing visa barriers by addressing travel visa exemptions and administration;

[19] The Canadian Tourism Commission Global Tourism Watch Studies.

[20] HLT Advisory (2014). 2014 Gateway to Growth Annual Report on Canadian Tourism: Focus on the USA Market. Report for the Tourism Industry Association of Canada.

[21] Deloitte. Tourism in Canada. Seizing Economic Growth. (2014). Deloitte.

- Increasing airline competitiveness by reducing costs and opening more routes and capacity; and
- Increasing demand for travel to/within Canada by increasing (restoring) funds for marketing.

6 Aboriginal/Indigenous Tourism

The following sections summarize existing secondary research concerning five strategically important aspects of Aboriginal tourism in Canada to key themes.

1) **Aboriginal tourism industry (supply side information)** – information about the organizations working to support and grow Aboriginal tourism in Canada.
2) **Aboriginal tourism consumers (demand side information)** – what we know about consumers that are interested in Aboriginal tourism.
3) **Canada's competitors** – the countries that are competing with Canada to attract visitors interested in Aboriginal tourism.
4) **Barriers to growth** – challenges/issues that prevent Aboriginal tourism growth.
5) **Opportunities for growth** – where Canada's tourism industry can focus efforts in order to optimize growth.

6.1 The Aboriginal Tourism Industry (Supply)

Tourism businesses, governments and associations at all levels (federal, provincial and local) must work to develop and market Aboriginal tourism in Canada. This section describes the Aboriginal tourism industry from the supply-side perspective (those providing the experiences). It includes the roles and activities of various factors including all levels of government, the travel trade and Aboriginal tourism businesses.

6.1.1 Aboriginal Tourism Organizations

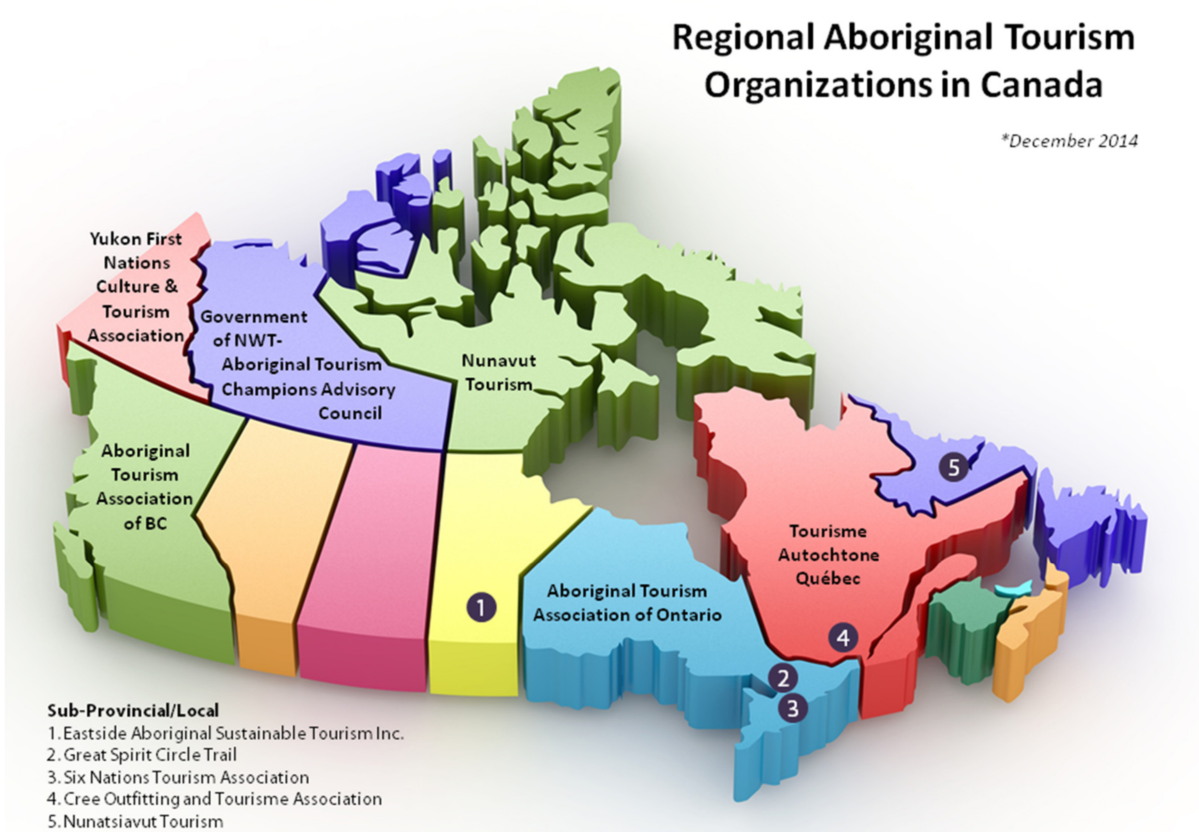
In Canada, five provinces/territories have specific organizations or initiatives mandated to support the development and marketing of Aboriginal tourism. They include:

1) Aboriginal Tourism Association of British Columbia (AtBC);
2) Tourisme Autochtone Québec;
3) Yukon First Nations Culture and Tourism Association;
4) Aboriginal Tourism Marketing Council (NWT); and
5) Aboriginal Tourism Ontario (new, launched April 2014).

In Canada, there are five sub-provincial/territorial (regional or local) Aboriginal tourism organizations that work to develop and market Aboriginal tourism.

1) Eastside Aboriginal Sustainable Tourism Inc. (Manitoba)
2) Great Spirit Circle Trail (Ontario)
3) Six Nations Tourism Association (Ontario) (under Six Nations Economic Development)
4) Cree Outfitting and Tourisme Association (Quebec)
5) Nunatsiavut Tourism (Labrador)

Exhibit 6-1: Regional Aboriginal Tourism Organizations in Canada



This differs from 2002, when nearly every province/territory had a regional Aboriginal tourism association[22] (RATA) or organization (Exhibit 6-2). The lack of organized and established regional Aboriginal Tourism agencies / organizations was of concern to many ATAC members. Where an organization or supported initiative does not exist, ATAC members do their best to provide support, often this is in addition to their own full-time commitments (employment and / or operating their own business). However, development is hindered in that region where these leaders are without a formal mandate to represent Aboriginal tourism, and without dedicated staff and other resources to support its development.

[22] A Regional Aboriginal Tourism Association (RATA) is an organization that promotes Aboriginal tourism in its region, typically the full or part of province or territory; it may also be more than one province or territory.

Exhibit 6-2: Aboriginal Tourism Organizations in Canada

	Aboriginal Organization Status		
Province/Territory	2002	2014	Comments
British Columbia	AtBC	AtBC (same)	Established in 1996, expanded greatly in 2005 following completion of the Blueprint Strategy.
Alberta	Niitsitapi Tourism Society of Alberta	None	Niitsitapi closed in 2003, then there was little Alberta Government organization support.
Saskatchewan	Was launching	None	Organization did not establish.
Manitoba	Manitoba Aboriginal Tourism Assoc. (MATA)	None	MATA closed shortly after launching.
Ontario	Two organizations – Aboriginal Tourism Association of Southern Ontario (ATASO), Northern Ontario Native Tourism Assoc. (NONTA)	*Six Nations Tourism (under Six Nations Economic Development)	No provincial organization; however there are leads that connect regularly, and are involved with ATAC. Great Spirit Circle Trail has developed an extensive list of Aboriginal businesses in Canada.
Quebec	Societe Tourisme Aboriginale Quebec (STAQ)	Tourisme Autochtone Québec	Established in 1991, since then name change and organization restructuring to meet industry needs.
Atlantic - Newfoundland/Labrador - Prince Edward Island - Nova Scotia - New Brunswick	No organizations, no data available	None	In 2014, an Atlantic Aboriginal tourism organization was proposed; however, leads decided to focus on Nova Scotia region.
Yukon	Yukon First Nations Tourism Assoc. (YFNTA)	YFNCT	YFNTA became inactive for two years, resulting in no focus on or services for tourism or arts/crafts.
Northwest Territories	NWT Aboriginal Tourism (NWTAT)	Aboriginal Tourism Champions Advisory Council	NWTAT ended; activities continued through Government of NWT, which setup the Aboriginal Tourism Champions Advisory Council made up of individuals with a mandate to advise the GNWT Minister and act as regional champions, has also developed an Aboriginal strategy which it is implementing.
Nunavut	Nunavut Tourism	Nunavut Tourism (same)	Aboriginal initiatives continue to be part of main organization.

6.1.2 National Aboriginal Tourism Inventory

Aboriginal tourism businesses in Canada are diverse and located in urban and rural regions across the country. This section identifies their number and distribution. Its findings are based on information compiled from directories, lists, and websites generated through ATAC regional members, Aboriginal Capital Corporations, Aboriginal export agencies, provincial and territorial travel organizations, along with internet searches of relevant First Nations, and other on-line tourism related sources associated with Google, Facebook, and Trip Advisor.

To the extent identifiable, only those businesses that were either partially (1-50%) or majority (51%+) owned by Aboriginals were included in the inventory. Partially owned businesses were incorporated as they were considered to be sources of revenues for Aboriginal owners, as well as potential or actual generators of employment, skills development , capacity building and future entrepreneurship and new venture development of for First Nation's communities; however, data concerning the level of Aboriginal content was not available.

Where feasible, the inventory was also cross-referenced with lists compiled in the 1997 Canadian National Aboriginal Tourism Association (CNATA) Conference Board of Canada business survey. The lists developed at that time were by sourcing business directories and through discussion with Regional Aboriginal Tourism Associations (RATAs) who were familiar with the number of tourism businesses operating in their respective regions.

It is important to note that the current ATAC inventory also identified other Aboriginal themed ventures owned by government and / or other non-profit tourism business operations (e.g., typically museums, attractions and historical sites). These were included because it was considered that at least some of the revenues generated were at least partially attributable to the presence of the Aboriginal content and quite likely employed some Aboriginal personnel in their operations. While existing databases do not capture the full scope of such operations, the research conducted did identify over 170 Aboriginal themed operations of this type, with the largest numbers of them being located in Alberta (54), Manitoba (49), Saskatchewan (19), and Northwest Territories (18).

Exhibit 6-4 lists the number of Aboriginal owned, majority and minority (less than 51% ownership), per province and territory, by tourism sector. Over 1,500 Aboriginal tourism experiences were identified across Canada. This is an increase of 78 businesses since the 1997 CNATA study. While, there are several regions where business numbers decreased, it is not an indication that the interest or level of participation since 1997 has changed. The reason may be attributed to changes in technology, reduction in the level of Aboriginal business support available nationally, elimination of the Regional Aboriginal Tourism Association (RATA) program, and lack of a central Aboriginal-led tourism figure, and undeveloped or maintained list of Aboriginal tourism businesses. In regions where there is currently not a regional Aboriginal tourism initiative, there most often are Aboriginal volunteers performing this role in addition to their regular work and business functions.

One-third of the Aboriginal tourism businesses identified are located in Ontario (469) followed by British Columbia with one-fifth (20%) (301) and Quebec at 13% (197) (Exhibit 6-3).

Exhibit 6-3: Aboriginal Tourism Businesses by Region

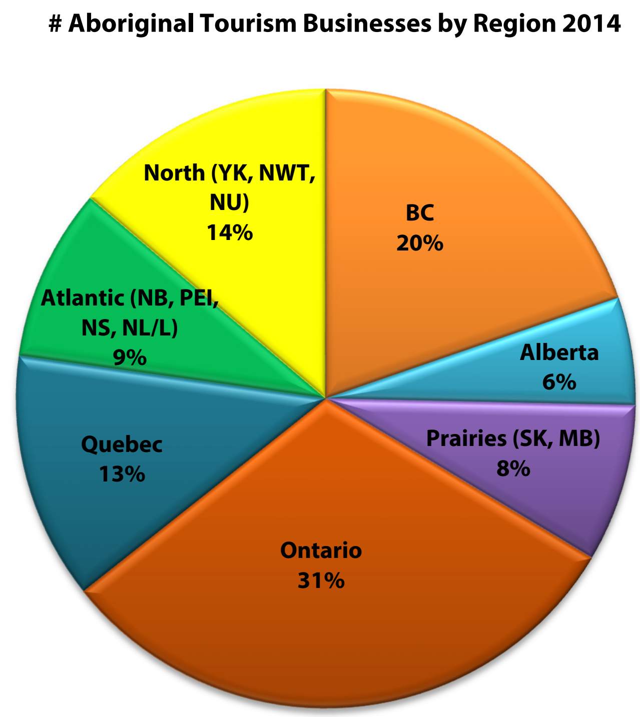


Exhibit 6-4: Aboriginal Tourism Businesses

	Aboriginal Owned	Tourism Sector													
		Attractions	Resort / Casino	Accommodation	Outdoor Adventure	Food and Beverage	Festivals and Events	Retail	Transportation	Other	1997 CNATA Study	Change	# of First Nations[2]	% Bus by # First Nations[3]	% Business of Total
British Columbia*	301	48	6	37	80	16	15	40	6	53	239	62	198	156.1%	20%
Alberta	86	11	5	15	23	4	9	11	1	7	95	-9	48	291.7%	6%
Saskatchewan	82	1	12	13	12	3	39	2	0	0	167	-85	70	144.3%	5%
Manitoba	44	4	5	5	2	0	3	26	0	1	108	-64	63	147.6%	3%
Ontario*	469	38	4	70	77	70	24	133	31	22	301	168	139	344.6%	31%
Quebec*	197	20	0	41	63	21	8	23	10	11	222	-25	39	507.7%	13%
New Brunswick	47	4	3	2	0	17	14	6	0	1	13	34	15	313.3%	3%
Prince Edward Island	11	2	0	0	0	1	3	5	0	0	1	10	2	550.0%	1%
Nova Scotia	38	9	0	0	2	2	1	24	0	2	18	20	13	307.7%	2%
Newfoundland/Labrador*	42	2	0	8	7	4	5	8	3	5	7	35	4	1125.0%	3%
Yukon*	58	12	0	15	16	5	1	6	2	1	59	-1	14	414.3%	4%
Northwest Territories*	88	7	0	25	31	6	2	12	5	0	58	30	33	321.2%	6%
Nunavut Territory* [4]	64	3	0	29	12	3	2	11	3	3	161	-97	28[1]	392.9%	4%
TOTAL	**1,527**	**159**	**35**	**260**	**325**	**152**	**126**	**307**	**61**	**106**	**1,449**	**78**	**666**	**260.8%**	**100%**
		10.3%	2.2%	17.5%	20.9%	10.3%	8.5%	19.7%	4.0%	6.8%		8.1%			

**Aboriginal led tourism organizations exist*

[1] *Northern Canada – Yukon and Nunavut do not have Indian Reserves. In Yukon they are settlements, and are now confirmed in Treaty agreements. In Nunavut, Indigenous communities are commonly called hamlets. Northwest Territories mostly have First Nation/Indigenous settlements and two Indian Reserves.*

[2] ***#of First Nations** – is the total number of First Nations Bands, communities, settlements, or hamlets in the province or territory; they may not have a tourism business.*

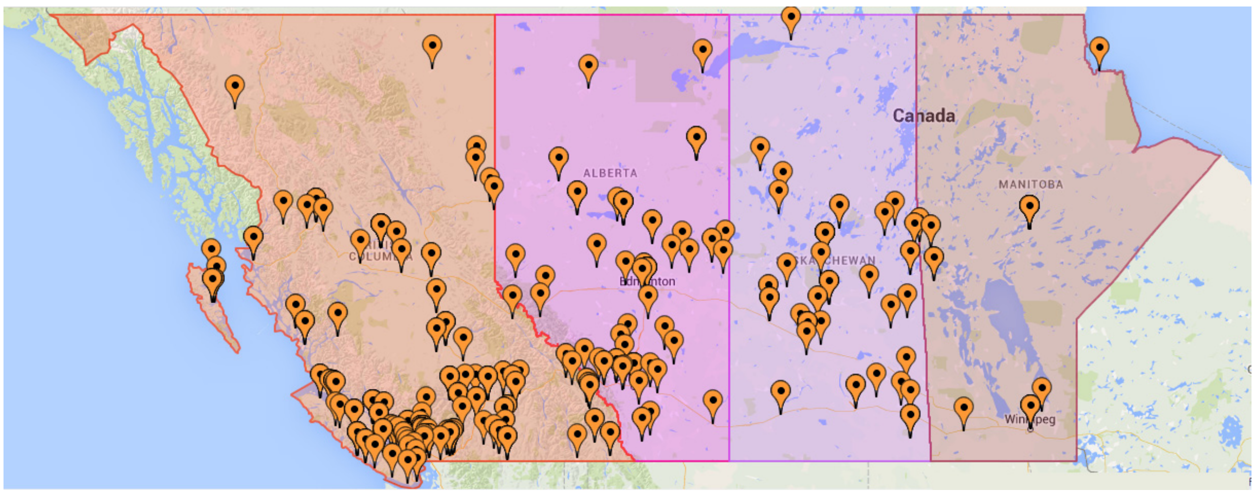
[3] ***% of Bus. by # of First Nations** – is the percent of Aboriginal tourism businesses based on the nu8.3mber of First Nations in that province or territory.*

[4] *Nunavut does not have any Indian Communities/Bands/Reserves. Instead the Indigenous population is large part of the population in every village; the number of villages/towns in Nunavut has been used to identify the number of First Nation communities. In 1997, any tourism business operating was considered Aboriginal; in 2014, actual ownership was identified.*

The top three tourism sectors for Aboriginal tourism are: Outdoor Adventure (20.9%) which is one-fifth of the experiences; followed by Retail (19.7%) which includes art galleries, gift shops and gas stations (which serve visitor markets, not primarily locals); and, Accommodations (17.5%). While some provinces and territories show a decrease in the number of businesses since 1997, these changes may be attributed to: 1) the regional organization not maintaining Aboriginal tourism inventory lists; and, 2) differ by regional discrepancies in what businesses and sectors are recognized as Aboriginal tourism (e.g., regions often did not collect information on festivals and events, gift shops/galleries, and travel support such as gas stations).

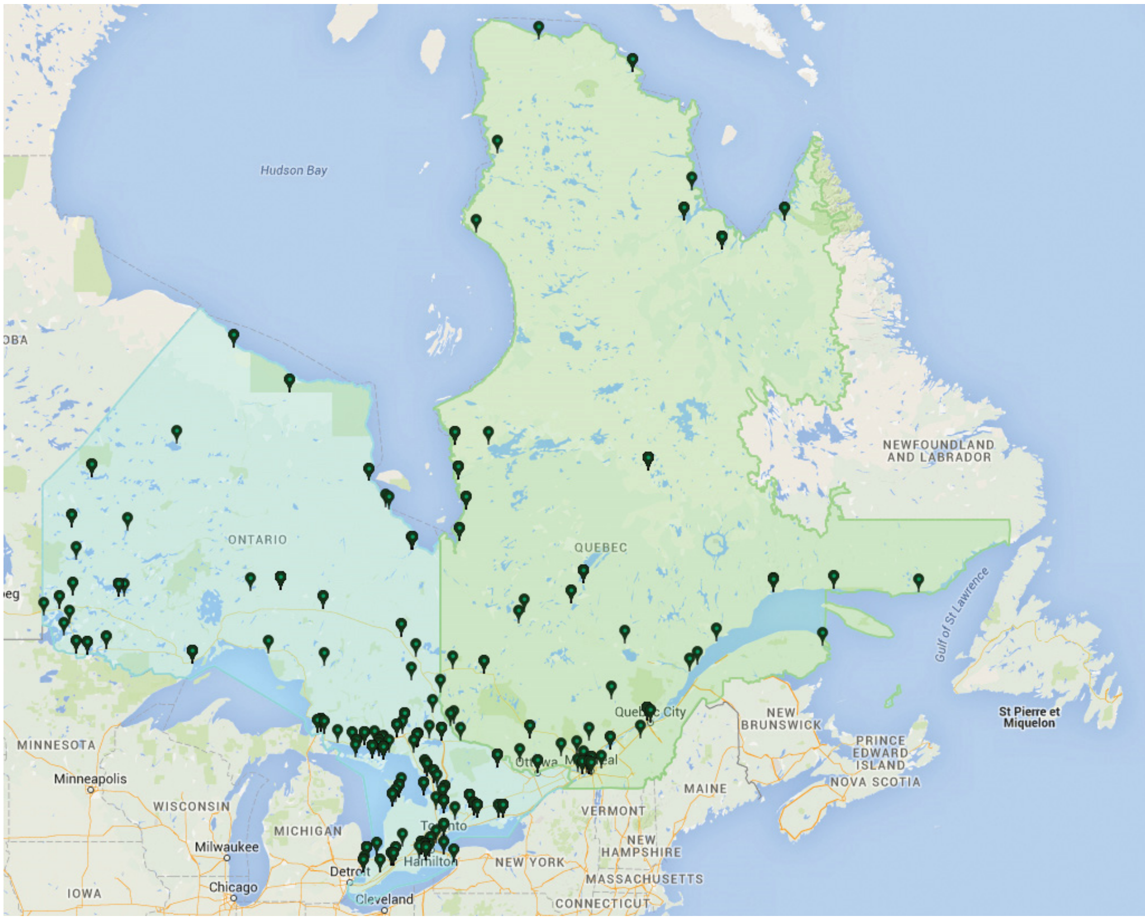
The following maps illustrate where the Aboriginal tourism businesses are located in each region. Often the businesses are located near major centers, gateways or corridors (e.g., roads), or on the coast.

Exhibit 6-5: Western Canada Aboriginal Tourism Business Locations



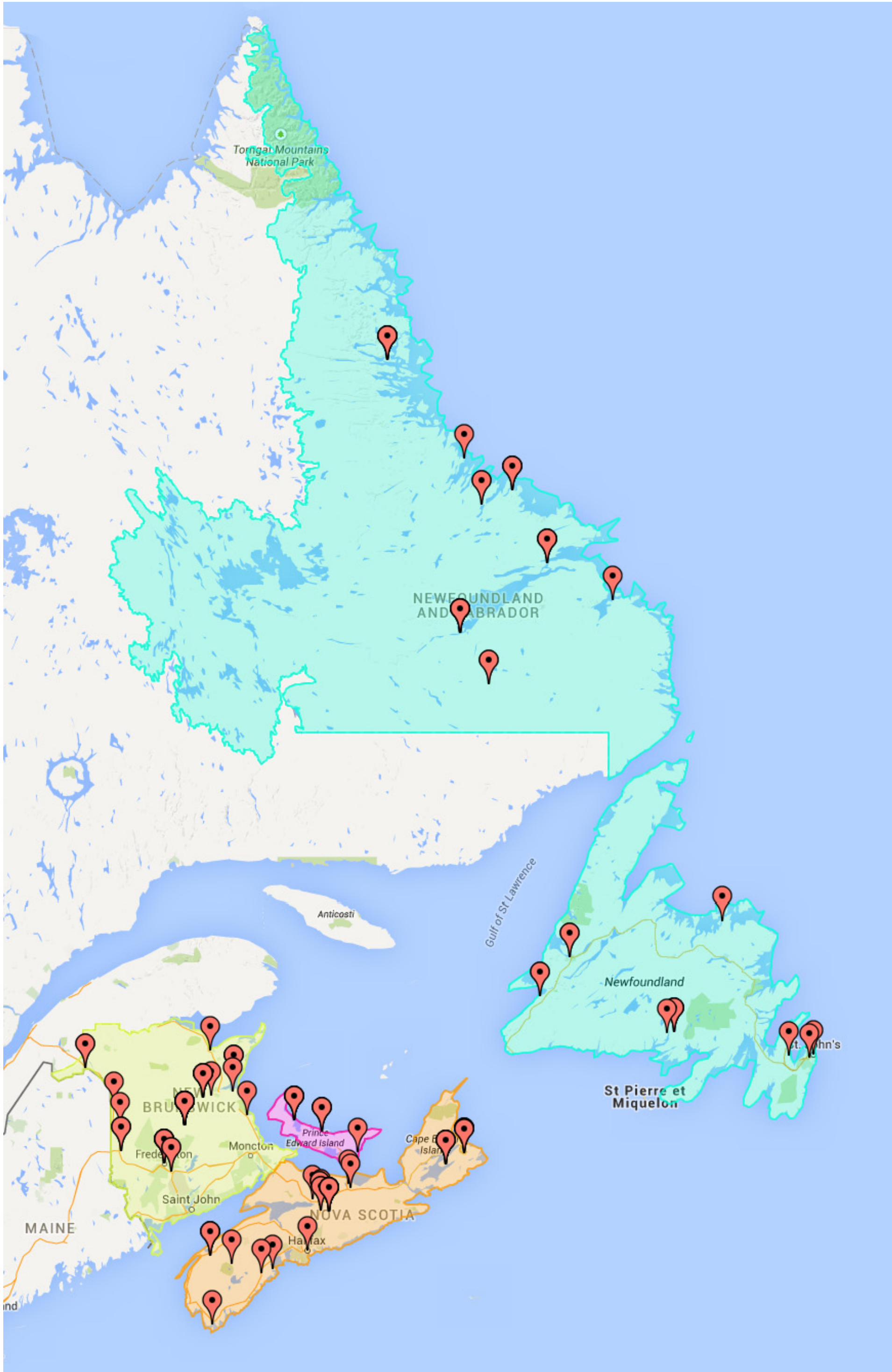
SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Exhibit 6-6: Central Canada Aboriginal Tourism Business Locations



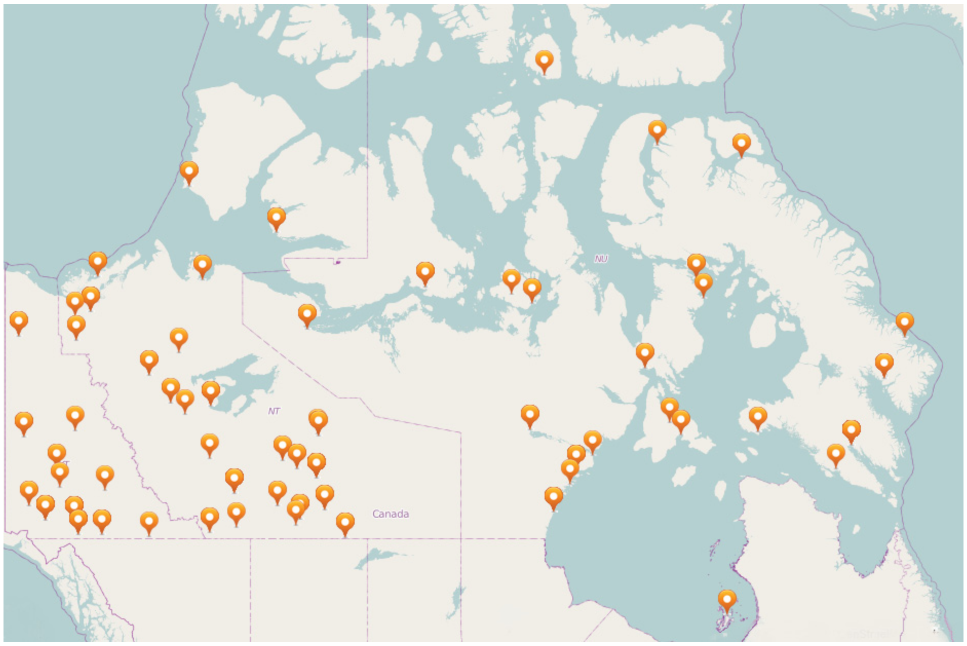
SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Exhibit 6-7: Atlantic Canada Aboriginal Tourism Business Locations



SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Exhibit 6-8: Northern Canada Aboriginal Tourism Business Locations



SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

6.1.3 Governments, Associations, Destination Marketing Organizations (DMOs)

While most regions have not had a RATA in more than a decade, there continues to be Aboriginal tourism initiatives in many parts of Canada.

National

The Aboriginal Tourism Association of Canada (ATAC), formerly known as the Aboriginal Tourism Marketing Circle (ATMC), is a partnership between associations, organizations, government departments, and industry leaders which allows a collective pursuit of initiatives to support the growth of Aboriginal tourism in Canada.[23] The key ATAC initiatives are listed below:

- Setting national guidelines for authentic and quality Canadian Aboriginal tourism experiences;
- Aboriginal tourism market and industry research (including coordination of this study);
- National Aboriginal tourism marketing strategy development;
- Sponsorship of the Aboriginal Cultural Tourism Award, part of the Canadian Tourism Awards presented by the Tourism Industry Association of Canada that recognizes an Aboriginal tourism business that has demonstrated a commitment to the development, promotion and delivery of an authentic, innovative and enriched Aboriginal cultural tourism visitor experience; and
- Support and promotion of the National Aboriginal tourism conference.

The Canadian Tourism Commission (CTC) also promotes Aboriginal tourism as part of on-going market development activities. Specific activities include:

[23] http://Aboriginaltourismmarketingcircle.ca/about-atmc/

- Displaying Aboriginal tourism products prominently on its consumer website;
- Highlighting 28 Aboriginal experiences in its high profile Canadian Signature Experience portfolio;[24]
- Incorporating Aboriginal tourism in its spring 2013 European marketing campaign; and
- Occasionally embedding Aboriginal tourism into its market research initiatives.

Additionally, Federal Government departments have formed an Aboriginal tourism working group that works to coordinate its activities in ways that support Aboriginal tourism development. The working group has members from the following organizations:

- Aboriginal Affairs and Northern Development Canada
- Atlantic Canada Opportunities Agency
- Canada Economic Development for Quebec Regions
- Canadian Heritage
- Canadian Tourism Commission
- CanNor
- Employment and Social Development Canada
- Environment Canada
- Federal Development Ontario
- Industry Canada
- Natural Resources Canada
- Parks Canada

Provincial and Territorial

While not all provinces have a provincial Regional Aboriginal Tourism Association (RATA), most have identified it as a strategic priority for development. In Nunavut where 86% of the population is of Indigenous origin, they do not distinguish Aboriginal and non-Aboriginal tourism in their activities; Aboriginal tourism activities are woven into their everyday planning.

In Alberta, where there is no RATA, the government has promoted Aboriginal themed experiences in its marketing programs, and corresponds with the ATAC Aboriginal Alberta contact. In the other provinces where there is no RATA, the ATAC Aboriginal members are all involved in Aboriginal tourism operations.

As in 2002, the Northwest Territories Aboriginal Tourism Champions Advisory Council and Nunavut Tourism continue to operate within the territorial governments and serve both the Aboriginal and non-Aboriginal tourism sectors.

[24] http://en-corporate.canada.travel/research/product-knowledge

Exhibit 6-9: Regional Aboriginal Tourism Associations 2015

		DMO Consumer Website Analysis			
	Aboriginal Tourism Strategic Priority of Provincial DMO	Aboriginal Imagery on Consumer Website Home Page	Aboriginal Packages / Recom-mended	Aboriginal Exclusive Page	2015 Regional Aboriginal Tourism Association / Organization
British Columbia	✓	✓	✓	✓	Aboriginal Tourism Association of BC
Alberta	✓		✓	✓	None
Saskatchewan	✓	✓	✓	✓	None
Manitoba	✓				None
Ontario			✓	✓	Aboriginal Tourism Ontario (new)*
Quebec	✓			✓	Tourisme Autochtone Québec
New Brunswick			✓	✓	None
Prince Edward Island					None
Nova Scotia			✓	✓	None
Newfoundland/ Labrador	✓				Nunatsiavut Tourism
Yukon	✓	✓	✓	No, but all pages have content	Yukon First Nations Culture and Tourism Association
Northwest Territories	✓	✓	✓	No, but all pages have content	Aboriginal Tourism Champions Advisory Council
Nunavut	✓	✓	✓	✓	None

**New organization – launched April 2014. http://www.manitoulin.ca/2014/04/09/Aboriginal-tourisms-ontario-initiative-launched-at-island-tourism-conference/*

6.1.4 Travel Trade

Comprehensive travel trade research (in 2007) conducted on behalf of the Canadian Tourism Commission (CTC) identified the points listed below.[25]

- Generally, the travel trade was supportive of Aboriginal tourism. Travel trade professionals that were most knowledgeable about Aboriginal tourism were the most supportive and indicated the most demand.
- Receptive tour operators and those based in Europe had the most knowledge of Aboriginal tourism in Canada. Overall, travel agents had minimal knowledge of the sector.
- The travel trade expressed some concern that some businesses had poor product delivery and were not yet 'market-ready'.
- There was most opportunity in experiential products that were authentic, not staged or artificial experiences with imitation or mass produced crafts and souvenirs.

[25] Insignia (2009). Aboriginal Tourism Opportunities for Canada, UK, Germany and France. Prepared for the Canadian Tourism Commission.

- Canada needed to create a much stronger awareness of its Aboriginal tourism experiences. When it does, it has to communicate how they are uniquely different from those of other countries, as well as work to improve product quality, especially with respect to making more products market-ready.

6.1.5 Businesses and Economic Impact (Historical)

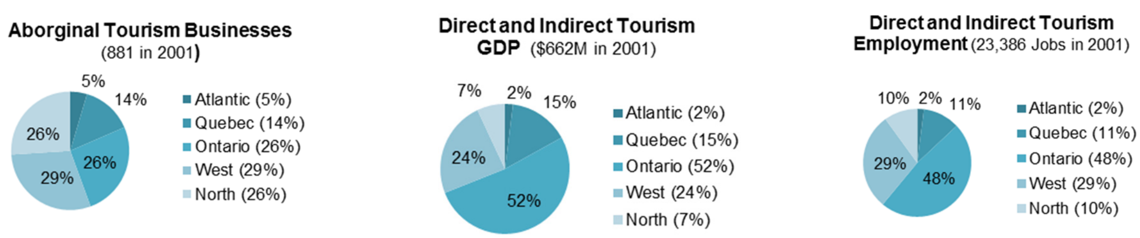
In 2001, there were about 881 Aboriginal tourism businesses in Canada. There was a fairly even distribution of tourism businesses between the western provinces (29%), the northern territories (26%) and Ontario (26%) at that time fewer were found in Quebec (14%), and the Atlantic Provinces (5%).

Aboriginal tourism businesses generated significant economic activity for the Canadian economy in 2001. Overall, Aboriginal tourism businesses (including casinos) generated about $4.9 billion in economic activity including direct, indirect and induced impacts.[26]

Considering only those impacts that are driven by tourism expenditures (and not expenditures by local residents), Aboriginal tourism businesses generated $2.9 billion in economic activity. That economic activity generated about $662 million in GDP and 23,000 jobs (including casinos).

Almost half of GDP and jobs were generated in Ontario, followed by the west (24% GDP, 29% jobs). Fewer economic impacts were produced in Quebec, the North and Atlantic provinces. The proportionally high economic impact in Ontario was primarily due to the impact of high casino revenues.

Exhibit 6-10: 2001 Economic Impact Results



There is evidence at the provincial level that Canadian Aboriginal tourism has grown considerably over the past decade. In British Columbia research has demonstrated that:[27]

- There were about 3.7 million visitors that experienced Aboriginal tourism in 2010, which was almost double 2006 levels;
- Estimated Aboriginal tourism visitor expenditures were $40 million in 2010, which was double 2006 levels;

[26] Note: These values represent DIRECT economic impact generated from tourism expenditures, including casinos. The values do not include impacts indirect or induced economic impacts or those generated from business activities outside of the tourism industry (e.g., Locals). A tourist was defined as someone who had travelled more than 80 km from their home for leisure or business purposes.

[27] O'Neil, B and PW Willams (2013). AtBC Blueprint Strategy Tourism Performance Audit Report 2006-2012. Prepared for Aboriginal Tourism Association of BC.

- Demand for Aboriginal tourism products and services accelerated the emergence and / or expansion of new businesses. There were 204 businesses in 2012, an 85% increase over 2006; and
- In 2012, there were about 2,900 full-time employees working at Aboriginal tourism businesses. This represented growth of 66% from 2006.

Similarly, research in Quebec demonstrated there was:[28]

- About 50 more Aboriginal tourism businesses in 2010 (total 198) than 2002;
- A 65% increase in economic impacts between 2002 and 2010 ($169 million);
- 3,434 FTEs in 2010 which represents a 10% growth in employment since 2002; and
- A higher average annual business revenue ($600,000) in 2010 compared to 2002 ($340,000). This was in part, due to a longer operating season, since businesses responded they were open for more days in 2010 compared to 2002.

6.2 Demand Side (Consumer Summary)

Over the past two decades several market studies have provided indications of the potential magnitude and traits of travelers interested in Aboriginal tourism in Canada. While prepared at different times and for varying objectives, collectively, they provide strong indications of the market and product development opportunities for Aboriginal tourism in this country. This section provides a summary of overriding findings, for Canada's key markets stemming from these investigations.

6.2.1 Key Markets

Three studies examine the market potential of Aboriginal tourism in Canada, they are summarized below.

Research in 2007 determined that awareness of Canada as a travel destination for Aboriginal tourism was low and ranged (by market) between one and 13%.[29] Also, there was strong interest in Aboriginal tourism activities from some Asian (e.g., China, South Korea) and European (e.g., France) countries.

A second study, also commissioned by the CTC (also in 2007) examined Aboriginal tourism opportunities in the key European markets of the United Kingdom, Germany and France.[30] It found:

- There was relatively low awareness of Aboriginal tourism product in Canada; and
- Of potential travelers to Canada, there was the most interest from France (86%), followed by Germany (72%) and the United Kingdom (46%).

[28] Desjardins Marketing Strategique Inc. (2011). Étude 2011 de retombées économiques du tourisme autochtone. Tourisme Quebec.

[29] TNS Canadian Facts (2007). Interest in Aboriginal Tourism a Multi-County Study. Prepared for the Canadian Tourism Commission.

[30] Insignia (2009). Aboriginal Tourism Opportunities for Canada, UK, Germany and France. Prepared for the Canadian Tourism Commission.

More recently, the CTC's series of Global Tourism Watch studies analyzed the importance of Aboriginal tourism in destination selection in each market. Results conclude that:

- The importance of Aboriginal tourism differs by market;
- Importance is highest in France, China, India, Germany, South Korea and Mexico;
- Importance is lower in the United States, Brazil, the United Kingdom, Canada, Australia, and Japan; and
- Results for Europe (United Kingdom, Germany and France) mirror those of the 2009 Insignia study.

Exhibit 6-11: Market Potential and Importance of Aboriginal Tourism in Destination Selection[31]

Market	GTW Study Year	2 Year Size of Target Market (Millions)	2 Year Size of Immediate Potential (Millions)	Aboriginal Tourism Importance in Destination Selection
Canada	2013	14.2 (1 year)	8.5 (1 year)	48%
United States	2013	63.3	33.6	62%
Core Overseas				
United Kingdom	2012	16.5	4.9	56%
France	2013	13.6	5.8	81%
Germany	2012	14.5	6.0	75%
Australia	2012	6.5	2.4	47%
Emerging/Transition Overseas				
Japan	2013	13.0	3.4	41%
South Korea	2012	9.5	4.1	74%
Mexico	2013	3.7	2.1	71%
Brazil	2012	2.8	1.0	57%
China	2012	4.3	1.5	78%
India	2013	3.2	1.1	76%

Responses of 'always' or 'often' to the following question. *We are interested in knowing the types of activities and experiences you are looking for on your long-haul holidays. Please indicate how important each of the following activities is to you when choosing long-haul destinations.*
For Canada the question was, We *are interested in knowing the types of activities and experiences you are looking for on your vacation*.
For USA, the question was *We are interested in knowing the types of activities and experiences you are looking for on your International holidays*.

Overall, it is reasonable to conclude that Canada's position with respect to competitive advantage lies primarily in Europe (especially France and Germany) and North America (United States, Canada and Mexico). While intentions to visit Canada are significant in Asia, such possibilities are dampened by more competitive and proximate opportunities provided by Aboriginal tourism businesses in Australia/New Zealand.

6.2.2 Characteristics

Incidence

When actual levels of participation in Aboriginal tourism activities (incidence) are examined, results are not as impressive. Overall, incidence levels hover around 20%, but are region specific. Past research suggests the following trends of importance to Aboriginal tourism.

[31] The Canadian Tourism Commission Global Tourism Watch Studies.

- In BC, the overall incidence of visitors participating in an Aboriginal tourism activity was about 22% in 2010. This was up from 13% in 2006.[32] The accelerated growth was most likely due to the tremendous exposure from the 2010 Winter Olympic Games. Incidence was highest for BC residents (88%) but lower for visitors from places outside North America (8%).
- Between 16% (summer) and 18% (winter) of Yukon visitors participated in a First Nations culture activity in the summer of 2012. This was down from 23% in 2004.[33]
- A 2012 study of Ontario's key markets (Ontario, Quebec, Manitoba and the USA) found that only 2% of travelers experienced Aboriginal culture while travelling over the past year.[34]
- Research in the Northwest Territories indicated that in 2013,[35] 64% of visitors participated in Aboriginal tourism. The most common Aboriginal tourism activities in 2013 were visiting a cultural centre, museum, art gallery, or historic site. Aboriginal tourism activities were more available and easier to find in 2013.

The Ontario Tourism Marketing Partnership Corporation (OTMP) provided a summary of information about Canadians that included Aboriginal events in their trips in 2010. This information was summarized using results from the Travel Survey of Residents of Canada and found that:[36]

- Overall there were 527,000 visits that included attending Aboriginal events by Canadian residents in Canada;
- Compared to previous years, participation in Aboriginal events while travelling has increased, in 2007 there were 448,000 Aboriginal event trips;
- Trips that included attending Aboriginal events in Canada made up 0.2% of all visits; and
- Total expenditures on trips that included attending an Aboriginal event amounted to $292 million in Canada by Canadians in 2010, an increase from $284 million in 2007.

Traveler and Trip Characteristics

Research conducted by Destination British Columbia[37] summarized the 2006 Travel Activities and Motivations Survey (TAMS). The TAMS was a comprehensive survey of North American households that examined the travel habits, activities and behaviour of Canadian and American residents. The survey revealed that 11% of Canadian visitors participated in Aboriginal cultural activities, but it was only a travel motivator for 3% of respondents when selecting a destination to visit. Similarly, 8% of American visitors participated in Aboriginal cultural activities, but only 3% of visitors indicated Aboriginal cultural tourism was a travel motivator.

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[32] O'Neil, B and PW Williams (2013). AtBC Blueprint Strategy Tourism Performance Audit Report 2006-2012. Prepared for Aboriginal Tourism Association of BC.

[33] Department of Tourism and Culture Government of Yukon (2013). 2012/13 Yukon Visitor Tracking Program: Summer and Winter Reports. Government of Yukon.

[34] Ontario Tourism Marketing Partnership (2014). Summary of Aboriginal Tourism in Ontario. Unpublished research summary for this study. Ontario Tourism Marketing Partnership.

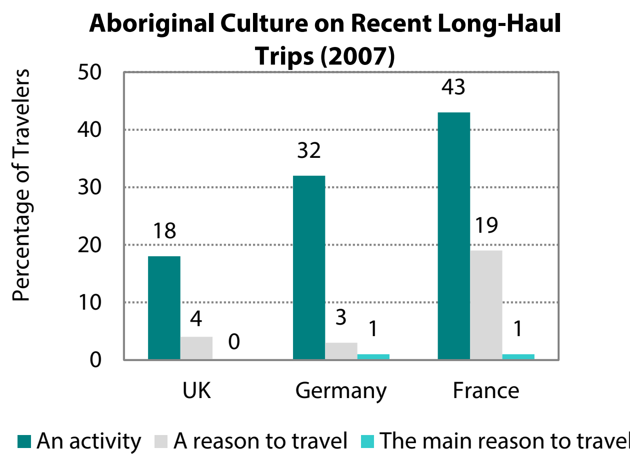
[35] Malatest Program Evaluation and Market Research (2013). 2013 Trip Diary Phone Survey Findings. Northwest Territories Industry Tourism and Investment.

[36] Ontario Tourism Marketing Partnership Corporation (2014). Custom Power Point Presentation Statistics about Aboriginal Tourism in Ontario. Ontario Tourism Marketing Partnership Corporation.

[37] Research, Planning and Evaluation Destination British Columbia (2014). Tourism Sector Profile: Aboriginal Cultural Tourism. Destination British Columbia.

Similarly, the 2007 CTC study of Aboriginal tourism opportunities in the United Kingdom, German and French market study found that overseas travelers were more much more likely to participate in Aboriginal tourism on the trip than plan their trip around it.[38] Also, a July 2008 study of visitors in the Yukon Territory also support the finding that Aboriginal tourism activities are part of a trip's activities rather than a trip motivator.[39]

Exhibit 6-12: Aboriginal Culture on Long Haul Trips[40]



Results from these three studies lead to the clear conclusion that for most travelers, engagement in Aboriginal tourism experiences is a much valued 'add-on' that arises as an unanticipated side benefit in a broader purposed trip. Aboriginal tourism opportunities are normally sought out while on trips, as opposed to during the pre-trip destination selection process.

Aboriginal tourism opportunities are normally sought out while on trips, as opposed to during the pre-trip destination selection process.

In terms of demographics, long-haul Aboriginal tourism visitors are similar to Canada's other international visitors in many respects[41]; however, they are also more apt to be:

- Married,
- Female,
- Have more formal education, and
- Be empty nesters (no children living with them).

[38] Insignia (2009). Aboriginal Tourism Opportunities for Canada, UK, Germany and France. Prepared for the Canadian Tourism Commission.
[39] Taiga Research and Consulting (2009). Demand for Aboriginal Cultural Tourism in Yukon. Prepared for Tourism Yukon.
[40] Insignia (2009). Aboriginal Tourism Opportunities for Canada, UK, Germany and France. Prepared for the Canadian Tourism Commission.
[41] Insignia (2009). Aboriginal Tourism Opportunities for Canada, UK, Germany and France. Prepared for the Canadian Tourism Commission.

In terms of trip characteristics, Aboriginal tourists are:[42]

- More likely to travel for longer periods;
- Spend more while en route;
- Spend a relatively short part of their trip participating in Aboriginal experiences (<14% of trip days); and
- Often spend only a few hours each day participating in those experiences.

In terms of experiences, international travel markets are most interested[43] in:

- Enriching, engaged, immersive experiences with Indigenous people;
- Entertainment oriented experiences and those that distance the traveler from Indigenous people are of lesser value and interest;
- Experiences that are related to nature and learning;
- Authenticity;
- Seeking benefits of 'discoveries' and 'adventures'; and,
- Connection to nature and Indigenous way of life in context of spirituality and culture traditions.

6.3 Canada's Aboriginal / Indigenous Tourism Competition

Global Tourism Watch studies illustrate that travelers in Canada's top markets who place importance in Aboriginal cultural tourism in destination selection are not always aware of Canada's experiences. More established Aboriginal tourism destinations have varying, but relatively strong presence in the minds of potential travelers to Canada.

In terms of destinations that are most associated with Aboriginal culture, Canada's key competitors are:

- Australia;
- New Zealand;
- Mexico; and
- United States.

A summary of the Aboriginal/Indigenous tourism situation in English speaking countries of Australia, New Zealand and the United States is provided below. Each section summarizes organizations working to grow Aboriginal tourism and any relevant research related to Aboriginal tourism.

[42] Porges, R and P. Williams, P. Nursey and B. O'Neil. (2012). Who is the Aboriginal Visitor? Prepared for National Aboriginal Tourism Opportunities Conference.

[43] Canadian Tourism Commission (2014). Research & Indigenous Tourism – The Importance of Results. Prepared for the 2014 International Indigenous Tourism Conference.

Exhibit 6-13: Top Three Countries Associated with Experiencing Aboriginal Culture and Attractions by Key Market [44]

Key Markets to Canada	Country Preferred for Experience Aboriginal Tourism			
	First Country	Second Country	Third Country	Canada's Rank (/8)
Canada	Canada	Australia/NZ	USA	1
USA	Australia	Mexico	Italy	5
Core Overseas Markets				
United Kingdom	Australia	New Zealand	South Africa	7
France	Thailand	Mexico	Australia	6
Germany	Australia	New Zealand	South Africa	7
Australia	NONE	Thailand	Canada	3
Emerging Transition Markets				
Japan	Australia	New Zealand	USA	4
South Korea	New Zealand	Australia	Canada	3
Mexico	Brazil	Argentina	Canada	3
Brazil	Australia	Mexico	USA	4
China	Australia	New Zealand	USA	4
India	Australia	Switzerland	France	7

Australia

Tourism Australia is the Australian Government agency responsible for attracting international visitors to Australia, both for leisure and business events. The organization is active in 17 key markets and activities include advertising, public relations and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research.[45] The brand concept is brought to life with the statement, "*Australia, the land that tells a thousand stories*" and the main messages of transformation, adventurous, nature, and wellness.

Tourism Australia's three year corporate plan summarizes the tourism strategy for 2020, meant to grow tourism's economic contribution.[46] The Tourism 2020 strategy outlines six key delivery strategies. Interestingly, Indigenous tourism is included under the workforce delivery strategy. The delivery strategy states "*it will address labour and skills shortages and greater Indigenous participation*". Tourism Australia will do this by promoting and developing Indigenous tourism product through working with the Indigenous Tourism Working group and through the Indigenous Tourism Champions Program (ITCP).

The ITCP is a joint initiative of Tourism Australia and Indigenous Business Australia that works in partnership with the State and Territorial Tourism Organizations. The organization looks to build the reputation of Indigenous tourism operators internationally through the marketing of 'champion' products'.[47] The ITCP is achieving this through selective marketing of product (47 businesses are profiled on the website) which has met stringent criteria, ensuring that the businesses being promoted are able to meet the needs and expectations of trade and the international market.

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[44] The Canadian Tourism Commission Global Tourism Watch Studies.

[45] http://www.tourism.australia.com/about-us.aspx

[46] Tourism Australia (2014). Tourism Australia Corporate Plan 2014-2017. Tourism Australia.

[47] http://www.tourism.australia.com/Aboriginal/news/Aboriginal-tourism-celebrating-achievements-of-indigenous-tourism-champions.asp

Tourism Research Australia's (TRA), International Visitor Survey (IVS) and National Visitor Survey (NVS), profile international and domestic overnight Indigenous tourism visitors.[48] In 2010, this research found the following key points.

- International and domestic Indigenous tourism visitors spent a total of $3.8 billion in Australia. There were 689,000 international Indigenous tourism visitors, who spent a total of 38 million nights in Australia, and a total of $3.3 billion.
- The international Indigenous tourism segment represented 13% of total international visitors, 20% of total international visitor nights, and 19% of total international tourism expenditures.
- The four largest source countries of Indigenous tourism visitors were the United Kingdom (18%), United States (12%), China (9%), and Germany (8%). Since 2006, key markets showing strong average annual growth were the Asian markets of Indonesia (10%), China (9%), India (6%), Thailand (6%), while France (5%) showed the strongest growth of the European markets. During the same period, significant declines in average annual growth were recorded for Korea (18%), Japan (14%), the United States (9%), and United Kingdom (9%).
- There were 306,000 domestic overnight Indigenous tourism trips, which generated 2.5 million visitor nights and $490 million in expenditure.
- The highest proportion of domestic overnight Indigenous tourism visits were made by adult couples (28%), friends or relatives travelling together without children (25%), and family groups (23%).
- On average, international and domestic overnight Indigenous tourism visitors stayed longer and spent more per trip than other visitors.
- The number of international Indigenous tourism visitors declined 3% (compared to 2009), while the number of domestic overnight trips declined by almost 17%. The total number of international and domestic overnight Indigenous tourism visitors have decreased sharply over the 2007-2010 period.

New Zealand

Tourism New Zealand's primary role is to promote New Zealand internationally though the "*100% Pure New Zealand*" brand. The 100% Pure New Zealand brand tells the story of how this country's unique combination of landscapes, people and activities cannot be found anywhere else in the world – it is a "100% Pure New Zealand" visitor experience.[49] The brand was launched in 1999 and has evolved over time, the latest adaption is *"100% Middle-Earth", "100% Pure New Zealand",* leveraging the huge exposure New Zealand is getting around the world from the first *Hobbit* movie. The "*100% Middle-Earth", "100% Pure New Zealand"* work was named best destination marketing campaign at the 2012 World Travel Awards.

Tourism New Zealand's has identified that unique Māori culture is one of the main reasons our visitors go to New Zealand; in fact, it ranks second (behind landscapes). In the most recent three year marketing plan (2014-2016), one tactic that Tourism New Zealand intends to use in order to convert more intent to actual visitation is using more Māori images in the range of marketing materials.

[48] Tourism Research Australia (2011). Snapshots 2011: Indigenous Tourism Visitors in Australia, Tourism Research Australia.

[49] http://www.tourismnewzealand.com/about-us/what-we-do/campaign-and-activity/

Tourism New Zealand states that the number, variety and quality of Māori tourism businesses have increased dramatically over the last few years and the sector now makes an important contribution to New Zealand's regional economies.[50] Tourism New Zealand's work in Māori development is focused on a few key areas:

- Building the organization's own internal capacity and understanding of Māori culture;
- Helping build the capability of Māori tourism businesses; and
- Working with international travel sellers to raise awareness of Māori tourism products.

Tourism New Zealand works with the regional tourism organizations and the New Zealand Māori Tourism Council (NZMT) to promote and develop Aboriginal Tourism. As part of a strategic plan to 2025, NZMT identified three broad goals to grow Māori tourism and to create opportunities for value generating partnerships with the wider tourism sector. The goals include:[51]

- Increasing value;
- Developing leadership; and
- Coordinating support.

New Zealand Māori Tourism (NZMT) is the national Māori tourism organization, representing and advocating for more than 200 Māori tourism businesses. Based in Wellington, NZMT's role is to influence investment decisions in Māori tourism, foster relationships within the sector and across the tourism industry, assist policy development, and to develop and implement strategies that encourage sector growth. It also provides an accessible point of contact with Māori tourism operators and stakeholders. www.maoritourism.co.nz

The annual Visitor Experience Monitor (VEM) run by Tourism New Zealand is a survey of over 4,500 international tourists who came to New Zealand for a holiday or to visit friends and family. The VEM is conducted annually and reports are published for nine key markets and Māori culture. Key findings about Māori tourism from the most recent report (2010/11) include the following:[52]

- Overall, about two in five (43%) visitors participated in Māori tourism activities in 2010/11 this was down from about half (53%) in 2008/09;
- The proportion of travelers that participated in Māori tourism activities varies by market;
- Travelers from China (68%) and Germany (62%) participate the most;
- Travelers from the United States (59%), United Kingdom (56%) and South Korea (56%) had mid-levels of participation;
- Travelers from Japan (28%) and Australia (28%) participated the least;
- There are typically high levels of awareness before booking that the activity included Maori cultural elements with this being a driving force in choosing activity providers; and

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[50] http://www.tourismnewzealand.com/about-the-tourism-industry/māori-tourism/

[51] New Zealand Māori Tourism (2007). Te Pae Tawhiti New Horizons STRATEGIC PLAN 2010 – 2025. New Zealand Māori Tourism. http://www.maoritourism.co.nz/about-us/who-we-are/strategic-plan-2010-2025/

[52] TNS (2011). Maori Cultural Activities Summary 2008/2011. Tourism New Zealand.

- Satisfaction with Māori cultural activities are rated reasonably well and in line with the average satisfaction level of all activities;
- Across all markets, visitors agreed that participation in an activity with a Māori Cultural element suggest that it increased their satisfaction with that particular activity; and,
- Although, the impact on overall satisfaction is negligible indicating that other types of activities have a greater impact.

United States

The Corporation for Travel Promotion, now doing business as Brand USA, was created in 2010 to encourage travelers from all over the world to visit the United States of America.[53] The Brand USA website does not describe any activities directly related to Aboriginal/Indigenous tourism. In the United States most development and marketing occurs at the state level. For example, the Arizona Office of Tourism actively promotes and develops American Indian tourism. It has a tribal advisory committee and works with American Indian communities to develop tourism[54]. On the national level there is a national association called the American Indian Alaska Native Tourism Association (AIANTA).

AIANTA is a non-profit association of Native American tribes and tribal businesses, organized in 1999, to advance Indian Country tourism. The association is made up of member tribes from six regions: Eastern, Plains, Midwest, Southwest, Pacific, and Alaska. In total, there are 139 businesses, individual, tribal, students, seniors and other corporate members listed on the AIANTA website.[55]

AIANTA's mission is to "*define, introduce, grow and sustain American Indian, Alaska Native and Native Hawaiian tourism that honors traditions and values*". Key projects and partners include international outreach (e.g., sponsoring booths at ITB), public lands outreach (e.g., working with the National Parks Service on interpretive activities), education, and training (e.g., annual conference).

Relevant, national research about Aboriginal tourism in the USA was not found.

In addition to AIANTA, there are two other notable Native American tourism related initiatives.

- **Native Hawaiians Hospitality Association (NaHHA)** – founded in 1997 by Dr. George S. Kanahele, Kenneth Brown and other Native Hawaiian professionals to address concerns about how Native Hawaiians and Hawaiian culture were perceived and represented in tourism. This private non-profit organization services corporate and community initiatives through project management, consulting, training and facilitation. NaHHA is the lead organization named to implement the Hawaiian Culture Initiative (HCI) which is one of nine initiatives of the Hawai'i Tourism Strategic Plan (TSP) 2005-2015. (www.nahha.com)
- **American Indian Foods (AIF)** – is a Native American organization that focuses on promoting the development of Native American cultural foods. AIF is "a program of the Intertribal Agriculture Council

[53] http://www.discoveramerica.ca/USA/about-us.aspx

[54] https://tourism.az.gov/arizona-office-tourism

[55] http://www.aianta.org/Mission.aspx

that began in 1998 under contract with the USDA Foreign Agricultural Service." The organization was developed as a platform for American Indian food businesses to showcase their products and share tribal cultures with the world. (www.americanindianfoods.com)

Mexico

Visit Mexico, the national marketing agency has a small section on Indigenous tourism in its consumer website. Its "*Magical Town's"* program encourages visitation to authentic Mexican communities. In addition, the Mexican Indigenous Tourism Network, or RITA (rough translation = Red Indian Tourism of Mexico) has the following mission, vision and strategies.[56]

Red Indígena de Turismo de Mexico, A.C. (RITA)

Mission: *To promote and strengthen the sustainability and sustainability of indigenous tourism services, as effective instruments for the conservation of cultural and environmental heritage, which form a basis for the development of good living through access to information, capacity building and appropriate technology fostered at all times the active and responsible participation of its members.*

Vision: *Being an association of indigenous tourism companies that affects the preservation of natural resources and in strengthening the foundations for its members affect, co-responsibility in matters of environmental and tourism policy in their areas of influence, which promotes sustainable development and sustained participation of its members.*

Strategies:

- *Encourage communication channels to increase community*
- *Fostering an entrepreneurial culture*
- *Training of trainers in developing productive projects (Business Plan)*
- *To promote the capabilities for creating and fostering community enterprises organized self-employment and development*
- *Build skills and strengthen capabilities to efficiently manage business strategies that allow them to place their products and services on a competitive*

http://www.rita.com.mx/nosotros.html

Africa

While there are several countries in Africa, consideration of Indigenous tribes of Africa has to be given when discussing Indigenous cultural tourism and competition. African tribal cultural tourism research was not available during this research project.

[56] http://www.rita.com.mx/nosotros.html

International Indigenous Tourism Coordination

The World Indigenous Native Tourism Association (WINTA) is an Indigenous-led global network of 170 Indigenous and non-Indigenous organizations located in 40 countries. The organization advocates for the inclusion of Indigenous businesses and communities in the tourism industry by undertaking tourism policy research, organizes tourism conferences and workshops, and provides strategic destination consulting services. (www.winta.org)

6.4 Constraints, Issues and Barriers

Past research and strategic planning has identified the following constraints, issues and barriers to the growth of Aboriginal tourism in Canada in a number of broad categories.

Product Development

- Inconsistency in quality of visitor experiences
- Lack of Aboriginal tourism product
- Limited consistency in delivery of authentic (not staged) experiences
- Inconsistent and sometimes expensive pricing
- Not meeting market-ready standards, essential for successful tourism businesses

Marketing

- Low market awareness of Canada as a destination known for Aboriginal tourism
- Unknown visitor expectations of Aboriginal tourism experiences
- Lack of understanding of key markets and customers

Lack of Funding

- Lack of access to capital funding to ‘kick start’ tourism businesses
- Lack of sustainable tourism development funding for tourism development for associations, communities, and initiatives

Human Resources

- Limited availability of skilled tourism labour
- Lack of tourism training
- Lack of sustained leadership/management training
- Limited literacy or English is a second language of business owners
- Competition from other sectors for workforce

Poor Community Support

- Instability in some First Nations Government
- Some tourism businesses are challenged in getting community consensus to operate (e.g., sometimes due to issues concerning distribution of profits)

- Some communities are perceived as non-supportive of entrepreneurship and tourism
- Some local First Nations Governments are more supportive of other industries that are perceived to bring in more dollars and economic benefits
- Fear of tourism negativity affecting Aboriginal culture and communities

Lack of Coordination

- Few linkages with the tourism industry
- Few linkages with other Aboriginal tourism businesses
- Fragmentation, not working together towards common goals, few linkages with local tourism activities

Destination Development

- Poor infrastructure (e.g., roads, signage), internet, health services
- Canada losing ground in global tourism market

6.5 Opportunities

Aboriginal tourism business leaders have good reason to be optimistic. Global tourism is expected to grow and Aboriginal tourism offers experiences that meet current and emerging consumer demand. Looking forward, there is much opportunity to enhance the role of Aboriginal tourism in the Canadian tourism industry. To take full advantage of this opportunity, there is an on-going need to enhance product development and marketing initiatives. Past strategic plans, market and visitor research indicate there are opportunities to:

- Raise overall awareness of the Aboriginal tourism product that Canada has to offer;
- Convert a greater portion of market intent (those who indicate interest but do not participate in Aboriginal cultural experiences during trips) to provide a significant added value to Canadian and regional Aboriginal economies;
- Continue to develop more engaging and quality experience options to attract and hold visitors at Aboriginal tourism venues for longer visits and greater on-site expenditures; and
- Enhance partnerships by working to coordinate destination, business and product development with other Aboriginal tourism businesses and the tourism industry.

At the same time, the Aboriginal sector dependence on the performance of the global and Canadian tourism industries should be acknowledged. The sector's future growth is constrained by barriers common to the overall tourism industry and also those unique to Aboriginal/Indigenous tourism. A key ingredient to overcoming growth barriers is to work with and coordinate future initiatives with other national, provincial and sector tourism organizations.

7 Case Studies in Aboriginal Tourism

Across Canada in the more the 1,500 Aboriginal tourism owned businesses, there are unlimited best practices and examples of how to start up and operate a successful, respectful cultural tourism experience. Many of these have been highlighted in the past in other Best Practices case studies. For this project, experiences were chosen from each region in Canada, from west to Atlantic, south to north, and feature varying characteristics of important to strengthening Aboriginal tourism. Selected were First Nations directed or Aboriginal owned tourism operations that starred: community development and planning, youth engagement, outdoor adventure, food and beverages, attractions, entrepreneurship, community leadership, and of course, Aboriginal culture and heritage.

- **Carcross-Taglish First Nation** in Yukon is a First Nation whose community economic development activities underscore tourism and how to engage youth and connect them to land and culture. This north-western community rose to the top of the mountain biking community, and is rapidly solidifying its role as a memorable experience as part of the Alaska cruise ship industry-Yukon experience.
- **B Dene Adventures** owner Bobby Drygreese shows how his long-time dream of operating an outdoor adventure was realized. A fishing camp teaching traditional Dene ways invites visitors to set up camp and learn how to prepare fish, while a translator provided by the tour company interprets (most visitors are from Asia). Working with business development organizations, building business management skills, planning, networking and working closely with tour operators in the Northwest Territories have been essential ingredients to Bobby's operation.
- **Steeve Gros-Louis is** an entrepreneur owning five operations in Wendake, Quebec, a community surrounded by Quebec City, and the heartbeat of the Huron Nation. While he owns and operates a restaurant, arts and crafts retail outlets, workshop, reef fish store, he is also a cultural entertainer, chairs the Quebec Aboriginal Tourism and Wendake Tourism organizations, and still makes time to be a cultural dancer-entertainer, scuba diver, and father. Ingredients to Steeve's success – passion, commitment, business acumen, and grounding in family, cultural values and ways.
- **Metepenagiag Heritage Park** was built in 2007 after the site was designated by the Monuments Board of Canada as an important heritage site after the 3,000 year old Oxbow fishing villages was uncovered in 1975-1977. The heritage part shows how a community can protect its heritage and share its culture through a community led partnership with government. For the Mi'kmaq of Miramichi it is also a place of celebration and symbolizes the enduring strength of the First Peoples of the land.

When reading the profiles of these leaders (Appendix 2), you will learn how they started, lessons learned along the way, essential ingredients and practices to success, what helped, what hindered, what the road bumps were and pitfalls were along the way, and how to get through them. Common in these operations were the characteristics listed in Exhibit 7-1.

Exhibit 7-1: Tips to Success

Tips to Success

1. Have business operating skills, especially how to manage finances.
2. Plan for the future, understand tourism impacts on the community and culture, engage the community in planning and operations.
3. Exercise leadership and vision – get involved with tourism organizations and groups, sharing your knowledge, ideas and skills.
4. Know your strengths, and shortfalls. Shortfalls can be minimized through planning and working with others.
5. Involve your community – in planning, developing ideas, and through employment.
6. Partner and connect with the local and regional tourism industry through networking events, committees, boards, memberships, and working together.
7. Understand that tourism is stronger when everyone works together – visitors buy a destination, not often a single business.
8. Operate with cultural values and principles, such as fairness, consistency, respect, and conservation.
9. Take pride in and respect for culture, history, heritage and traditional ways.
10. Know tourism market-readiness standards, and implement them into business operations and pricing.

PART 3: ECONOMIC IMPACT

The economic impact section provides an evaluation of the impact of Aboriginal tourism in Canada and of each region. These calculations are based on the primary and secondary research collected in the previous activities, and measures jobs created, income produced through jobs, and revenue generated through sales and tax, and other indicators.

8 Valuing Economic Impact of Canada's Aboriginal Tourism Sector

8.1 Defining the Aboriginal Tourism Sector

Using the World Tourism Organization's definition, a tourist is someone "who travels to and stays in a place outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated within the place visited". The goods and services associated with tourism create the opportunity for employment in many service industries. These service industries include: transportation services, such as airlines, cruise ships and taxis; hospitality services, such as accommodations, including hotels and resorts, and all types of restaurants and food services; entertainment venues, such as amusement parks, casinos, various music venues and the theatre; travel arrangement services, and retail shopping.

While there are different ways to quantify what is considered "tourism employment", the Human Resource Module (HRM) of the Canadian Tourism Satellite Account definition has been used for these forecasts. According to this definition…

> *"Tourism demand is the spending by Canadian and non-resident visitors on domestically produced commodities. This spending has a direct impact on a wide range of industries, some more so than others. This leads to a definition of a tourism industry as one that would cease to exist without tourism, or would continue to exist only at a significantly reduced level of activity. By this definition, travel services is a tourism industry, while retail trade, which derives some of its business from visitors, is not. A tourism commodity is a good or service for which a significant part of its total demand comes from visitors. Air passenger transportation is a tourism commodity, while groceries, although occasionally bought by visitors, is not, because most groceries are bought by local residents."* [57]

As such, five industries in the economy are considered as tourism industries – transportation, accommodation, food and beverage services, recreation and entertainment, and travel services – and total tourism employment in the HRM measures the total number of employee and self-employed jobs in these industries. In this case, each

[57] *Provincial-Territorial Human Resource Module of the Tourism Satellite Account, 2012*. Statistics Canada Catalogue no. 13-604-M.

job does not differentiate the source of demand, i.e., the demand can be attributed to tourism or non-tourism demand.

When a tourist spends on a tourism commodity, that amount of expenditure creates a direct requirement for the production of the tourism commodity. The impact does not end there though. The increased production of this commodity leads to increased production of all the intermediate goods that are used to make this tourism commodity, and the increased production of intermediate goods will in turn generate more demand for other goods and services that are used to produce these intermediate goods. As such, an initial demand for a commodity creates a chain effect down the production process, and the economic model to capture these activities in the input-output model.

Economic impact analysis is the study of the interconnectivity of industrial activities to determine the impacts of additional tourist expenditure on broader macroeconomic variables such as employment, Gross Domestic Products (GDP), and government tax revenue. In the next sub-section, the methodology applied to estimate such impacts is explained.

8.1.1 Methodology

The input-output model is built based on the input-output structure of the economy, which is essentially a set of tables describing the flows of goods and services amongst the various sectors of the economy. Such a model is useful in determining how much additional production is generated by a change in the demand for one or more commodities or by a change in the output of an industry.

Economic impact studies provide information on the amount and nature of spending generated by an agency/organization, facility, program, or event and are completed for a variety of purposes. Most often the impact figures generated measure the results of the proposed development, existing program, or event. They can also help determine which specific actions or plans will provide the most benefit to a community or region.

The program or event expenditures made by users are recycled throughout the area and often contribute significantly to the local economy.

Beyond the direct expenditures, input-output models can be utilized to analyze additional benefits to the local economy. This includes businesses providing goods and services to entities where direct expenditures occur. In addition, as a result of increased local household income, there may be further increases in overall expenditure. The latter is considered as a spin-off impact, which can also be captured by economic impact models.

Information derived from direct expenditure estimates still needs to be converted into values of macroeconomic variables, such as Gross Domestic Product (GDP) and employment, to gauge the magnitude of the impact and make meaningful comparisons of such impacts against other sectors of the economy. In addition to direct impacts, indirect and induced impacts can also be estimated through the use of an input-output model.

- **Direct Impact** measures the increase in industrial output and the increase in an industry's labour force created by the demand for, for example, cultural goods and services within the province on a yearly basis. The increase in government revenue can also be measured.
- **Indirect Impact** measures the change in industrial output and employment demand in sectors that supply goods and services to the arts and culture sector in the province.

- **Induced Impact** measures the changes in output and employment demand over all sectors of the economy as a result of an income increase in households impacted both directly and indirectly.

In economic impact analysis terms, "simple multipliers" capture the sum of direct and indirect effects. They are based on the assumption that households are "exogenous" and that there is no feedback between wages and production, meaning there is no recirculation of the wages earned as a result of increased production.

On the other hand, "total multipliers" capture the sum of direct, indirect and induced effects. Households are treated as "endogenous" and the payments for labour services, i.e., wages, are redirected in the economy through consumer expenditures.

It is generally acknowledged that simple multipliers underestimate economic impacts since households activity is absent and total multipliers overestimate economic impacts because of the rigid assumptions about labour incomes and consumer spending. The "true" impact is likely in between, and as such the simple multipliers and total multipliers can be considered as upper and lower bounds of multipliers effects.

The following estimations of the impact of Aboriginal tourism show direct impact first, followed by direct and indirect impacts, then as direct, indirect and induced impacts to the economy.

8.2 Quantifying the Economic Impact of Aboriginal Tourism Sector

There are a number of variables that are typically present in economic impact analysis, and they are described in the following subsections. The estimation process involves relying upon data from the Provincial Input-Output Multipliers tables (2010) produced by Statistics Canada as well as following the concepts and definitions of variables inherent in these tables.

8.2.1 Jobs

In the HRM of the Canadian Tourism Satellite Account, total employment measures the total number of employee and self-employed jobs in an industry. It should be noted that a job that exists for only part of the year (e.g., 4 months) counts as only a fraction of a job (1/3 of a job) for the year. It should also be noted that a part-time job at 10 hours a week counts as much as a full-time job at 50 hours a week; each is one job.

In the Input-Output Multipliers tables, the estimate of the total number of jobs covers two main categories: employee jobs and self-employed jobs (including persons working in a family business without pay). The employee jobs are converted to full-time equivalence based on the overall average full-time hours worked in either the business or government sectors.

Estimating direct employment in Aboriginal tourism businesses has been one of the most challenging tasks in this assignment. The research team took time to assemble an inventory of all Aboriginal tourism businesses in each province and territory. By cross-referencing with the Aboriginal Business Operators Survey, and analyzing the nature of each of these businesses, the research team produced the following direct employment estimates for Aboriginal-owned tourism businesses by province/territory (Exhibit 8-1).

Exhibit 8-1: Total Number of Employed in Aboriginal Tourism Sector by Province / Territory, 2014

Province / Territory	Transporta-tion	Accommoda-tion	Food & Beverage	Attraction[1]	Outdoor Adventure[1]	Events & Conferences (Festivals & Events)	Casinos /Resorts	Travel Services - Retail	Other	Total in Province / Territory
British Columbia	150	703	432	960	1,600	690	150	920	1,325	6,930
Alberta	25	285	108	220	460	414	125	253	175	2,065
Saskatchewan	0	247	81	20	240	1,794	300	46	0	2,728
Manitoba	0	95	0	80	40	138	125	598	25	1,101
Ontario	775	1,330	1,890	760	1,540	1,104	100	3,059	550	11,108
Quebec	250	779	567	400	1,260	368	0	529	275	4,428
New Brunswick	0	38	459	80	0	644	75	138	25	1,459
Prince Edward Island	0	0	27	40	0	138	0	115	0	320
Nova Scotia	0	0	54	180	40	46	0	552	50	922
Newfoundland/Labrador	75	152	108	40	140	230	0	184	125	1,054
Yukon	6	100	20	40	27	5	0	18	0	216
Northwest Territories[2]	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Nunavut	298	356	32	5	26	5	0	43	15	781
TOTAL	**1,579**	**4,085**	**3,778**	**2,824**	**5,373**	**5,576**	**875**	**6,455**	**2,565**	**33,112**

[1] *Recreation and Entertainment*

[2] *At the time of report production, there was insufficient data on Northwest Territories Aboriginal tourism.*

SOURCE: O'Neil Marketing & Consulting

Values in this table have been converted to full year equivalence based upon information available from the *Provincial-Territorial Human Resource Module of the Tourism Satellite Account 2012*, published by Statistics Canada, and represent the direct employment impact of the Aboriginal tourism sector.

8.2.2 Output

Gross industry output measures the value of industry production as a result of consumers' demand for a tourism commodity. Such values have not been gathered through our research process, but rather have been derived based on the relationships between employment and output in the Provincial Input-Output Multipliers tables.

8.2.3 Value Added

Value added measures the Gross Domestic Products (GDP) realized through economic activities in a province or territory. The difference between gross output and GDP is that total industrial output refers to the value of outputs produced, whether the products are used as an intermediate product (think of a log cut down from a tree for the purposes of building houses, for example) or used as a final product (think of a beam in a completed house). If we calculate gross domestic product this way, the cost of the log will be counted many times, as it moves from a raw product to its eventual use as a beam, and it is wrong. The value of total industrial output thus includes both the value of intermediate inputs and primary inputs – the latter being the labour and the capital in production. It is the sum of the latter, which is also referred to as the value added, that is equal to gross domestic product.

The GDP values have been derived through information available in the Provincial Input-Output Multiplier tables.

8.2.4 Wages and Salaries

Wages and salaries are a component of the GDP. It can be thought of as the main part of the return to labour in the total value added. The wages and salaries values have been derived through information available in the Provincial Input-Output Multiplier tables.

8.2.5 Government Tax Revenue

The types of taxes included in the Input-Output tables include indirect taxes on products as well as indirect taxes on production, at the federal, provincial, and municipal levels, where applicable, net of subsidies on products and / or production.

We note, however, that some of the consumers are Status Indians, and as such are exempt from certain sales taxes. Hence the estimates we provide here can be slightly overestimated.

The results of our valuation of the direct, indirect, and total economic impacts of the Aboriginal tourism sector in Canada can be found in Exhibit 8-2 to Exhibit 8-4.[58]

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[58] We have relied upon Statistics Canada's Provincial Input-Output Tables to derive our impact estimates on job, output, etc.; however, because in some detailed industries there are no multiplier values for some provinces due to confidentiality issues, therefore, we have used multiplier values in more aggregated industries. These instances include:

- Use of values in "Transportation and Warehousing" to estimate impacts in "Other transit and ground passenger transportation and scenic and sightseeing transportation" for Quebec, Ontario, BC, and Nunavut;
- Use of values in "Administrative and support, waste management and remediation services" for "Travel arrangement and reservation services" for Newfoundland and Labrador, Yukon, and Nunavut.
- Use of values in "Arts, entertainment and recreation" for "Amusement and recreation industries" for Newfoundland and Labrador, and PEI.
- Use of values in "Accommodation and food services" for "Travellor accommodation" for Yukon, NWT, and Nunavut.

Exhibit 8-2: Direct Economic Impact of the Aboriginal Tourism Sector by Province / Territory, 2014

Province / Territory	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes
British Columbia	5,585	$542,266,364	$293,344,038	$187,689,318	$15,063,860
Alberta	1,640	$169,684,521	$94,770,293	$60,366,681	$4,157,582
Saskatchewan	2,076	$187,680,328	$94,538,101	$53,367,255	$5,871,198
Manitoba	919	$85,365,083	$47,110,653	$27,599,621	$3,061,267
Ontario	9,212	$921,343,581	$502,121,353	$301,440,539	$25,429,858
Quebec	3,568	$297,520,940	$172,965,040	$103,174,065	$2,682,732
New Brunswick	1,146	$94,321,114	$47,597,341	$30,726,892	$3,155,679
Prince Edward Island	246	$19,694,731	$10,129,871	$5,246,616	$527,802
Nova Scotia	755	$54,384,709	$33,379,479	$20,981,364	$1,588,677
Newfoundland/Labrador	882	$95,631,165	$43,052,973	$27,223,131	$2,029,460
Yukon	137	$17,952,365	$8,431,749	$4,739,756	$909,448
Northwest Territories*	n/a	n/a	n/a	n/a	n/a
Nunavut	629	$164,832,995	$67,554,030	$47,672,317	$2,964,399
TOTAL	**26,797**	**$2,650,677,897**	**$1,414,994,922**	**$870,227,557**	**$67,441,963**

**At the time of publication, data was unavailable to determine the economic impact of Aboriginal tourism in the Northwest Territories.*

SOURCE: O'Neil Marketing & Consulting

Exhibit 8-3: Direct and Indirect Economic Impacts of the Aboriginal Tourism Sector by Province / Territory, 2014

Province / Territory	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes
British Columbia	7,225	$774,000,413	$427,389,053	$253,081,666	$21,640,596
Alberta	2,015	$241,553,237	$135,535,419	$80,411,116	$5,758,744
Saskatchewan	2,549	$257,789,618	$135,091,383	$71,844,986	$7,087,580
Manitoba	1,092	$109,223,187	$61,224,492	$33,904,529	$4,157,130
Ontario	12,057	$1,380,493,723	$750,051,307	$418,126,906	$42,662,026
Quebec	4,416	$424,570,869	$242,789,310	$134,225,218	$6,692,141
New Brunswick	1,397	$128,258,221	$65,664,437	$39,154,361	$4,289,009
Prince Edward Island	380	$25,424,503	$13,685,863	$6,920,041	$667,084
Nova Scotia	888	$73,153,728	$43,846,851	$25,635,046	$2,427,765
Newfoundland/Labrador	2,102	$135,677,815	$67,088,501	$40,090,598	$2,887,488
Yukon	169	$22,931,516	$11,413,361	$6,065,450	$949,951
Northwest Territories*	n/a	n/a	n/a	n/a	n/a
Nunavut	773	$200,833,715	$88,658,545	$58,527,513	$2,461,727
TOTAL	**35,063**	**$3,773,910,545**	**$2,042,438,523**	**$1,167,987,429**	**$101,681,240**

**At the time of publication, data was unavailable to determine the economic impact of Aboriginal tourism in the Northwest Territories.*

SOURCE: O'Neil Marketing & Consulting

Exhibit 8-4: Total (Direct, Indirect and Induced) Economic Impacts of the Aboriginal Tourism Sector by Province / Territory, 2014

Province / Territory	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes
British Columbia	8,443	$978,456,749	$561,433,614	$298,844,018	$30,223,495
Alberta	2,272	$296,020,401	$169,812,591	$92,821,569	$7,971,655
Saskatchewan	2,785	$300,634,558	$162,326,639	$80,748,117	$9,490,934
Manitoba	1,226	$130,226,259	$74,904,488	$38,614,358	$5,326,340
Ontario	14,044	$1,729,872,333	$957,410,568	$497,126,061	$63,211,888
Quebec	5,084	$526,130,129	$303,549,100	$157,079,790	$12,069,766
New Brunswick	1,549	$152,212,948	$80,037,134	$44,140,437	$5,509,317
Prince Edward Island	415	$29,168,316	$16,222,277	$7,710,929	$832,002
Nova Scotia	1,001	$90,417,277	$54,618,093	$29,342,205	$3,349,642
Newfoundland/Labrador	2,337	$158,042,799	$81,228,604	$45,257,839	$3,763,535
Yukon	180	$25,633,231	$13,304,973	$6,552,671	$1,045,119
Northwest Territories*	n/a	n/a	n/a	n/a	n/a
Nunavut	844	$223,069,526	$104,268,597	$62,814,138	$2,296,438
TOTAL	**40,180**	**$4,639,884,526**	**$2,579,116,679**	**$1,361,052,131**	**$145,090,129**

**At the time of publication, data was unavailable to determine the economic impact of Aboriginal tourism in the Northwest Territories.*
SOURCE: O'Neil Marketing & Consulting

8.3 Analyzing the Economic Impact of Aboriginal Tourism

As shown in Exhibit 8-1, in total, the number of Aboriginal tourism jobs generated in the economy amounts to around 32,100 across all provinces. These include full-time and part-time jobs. By comparison, this is equivalent to 2.0% of all jobs in tourism industries in Canada (as shown in Exhibit 8-5). These approximate 32,100 jobs are equivalent to about 26,000 full-time jobs in the economy.

Exhibit 8-5: Total Number of Jobs in Tourism Sector, Canada, Provinces and Territories, 2007 to 2012

	(Thousands of Jobs)					
Number of Jobs	2007	2008	2009	2010	2011	2012
Total tourism industries, Canada	**1,544**	**1,551**	**1,547**	**1,573**	**1,595**	**1,619**
British Columbia	267	261	264	282	282	287
Alberta	188	187	190	185	191	196
Saskatchewan	42	41	42	44	42	43
Manitoba	52	53	53	54	56	57
Ontario	563	573	571	572	587	591
Quebec	335	338	329	340	340	344
New Brunswick	28	28	29	27	26	27
Prince Edward Island	7	7	7	7	7	7
Nova Scotia	40	40	42	40	40	41
Newfoundland/Labrador	17	17	16	17	17	18
Yukon*	2	2	2	2	2	3
Northwest Territories *	3	3	3	3	3	3
Nunavut*	1	1	1	1	1	1
Total economy Canada[59]	**17,099**	**17,378**	**17,080**	**17,385**	**17,683**	**17,851**

Source: Statistics Canada, Provincial-Territorial Human Resource Module of the Tourism Satellite Account 2012

From Exhibit 8-1and Exhibit 8-5, each province's and territory's share of employment in Aboriginal employment and total tourism employment can be derived:[60]

- British Columbia (20.9% vs. 17.7%)
- Alberta (6.2% vs. 12.1%)
- Saskatchewan (8.2% vs. 2.7%)
- Manitoba (3.3% vs. 3.5%)
- Ontario (33.5% vs. 36.5%)
- Quebec (13.4% vs. 21.2%)
- New Brunswick (4.4% vs. 1.7%)

[59] From Statistics Canada CANSIM table no. 383-0031, November 2013.

[60] At the time this report is produced, no information on Northwest Territories is available and as such the provincial shares of employment in Aboriginal tourism total may yet to be revised.

- Prince Edward Island (1.0% vs. 0.4%)
- Nova Scotia (2.8% vs. 2.5%)
- Newfoundland and Labrador (3.2% vs. 1.1%)
- Yukon (0.7% vs. 0.2%)
- Northwest Territories*
- Nunavut (2.4% vs. 0.1%)

**There was insufficient data available of the Northwest Territories at the time of report production to generate calculations.*

In comparing employment distribution by province and territory in Aboriginal tourism sector and the overall tourism sector, the provinces and territories in which Aboriginal tourism employment accounts for a higher share than their counterparts in the overall tourism employment distribution include:

- Newfoundland and Labrador
- Nova Scotia
- Prince Edward Island
- New Brunswick
- Saskatchewan
- British Columbia
- Yukon
- Nunavut

Overall, for each direct job in Aboriginal tourism, there is an additional 0.31 of a job that is created to provide goods and services to the direct job. When the spin-off effect is taken into consideration, the additional benefit is 0.50 of a job created in the economy. Therefore, the multiplier effect of one direct Aboriginal tourism job is anywhere between 1.31 and 1.50.

In total, these Aboriginal tourism businesses directly contribute $2.65 billion in one year to gross output in our economy, which is equivalent to almost $1.41 billion in GDP, and bring in $67.4 million tax revenue to governments. When simple multiplier effects and total multiplier effects are also considered, the contribution of Aboriginal tourism is substantial. Exhibit 8-6 summarizes the multiplier values associated Aboriginal tourism activities in Canada.

Exhibit 8-6: Multiplier Effects of Aboriginal Tourism in Canada

Variables	Simple Multipliers (Direct and Indirect Impacts)	Total Multipliers (Direct, Indirect and Induced Impacts)
Employment	1.31	1.50
Output	1.42	1.75
GDP (Value Added)	1.44	1.82
Wages and Salaries	1.34	1.56
Government Tax Revenue	1.51	2.15

SOURCE: O'Neil Marketing & Consulting

We have also compared results of the values of economic impacts of Aboriginal tourism in Canada from this report with a 2002 Goss Gilroy report on the same topic. While the current study has not been designed as a direct replica of the 2002 study, and as such there are discrepancies in certain concepts and methods of estimation, there are areas in which comparison can be made and conclusions drawn.

There can be no doubt that Aboriginal tourism businesses have grown substantially in Canada during the time these two studies were undertaken (2002 and 2014). The highlights have been listed below, although it should be noted that these comparisons be considered indicative of the direction of the change, but not exact magnitude due to the fact that the variables being compared are not exactly the same.

- **The universe of the number of Aboriginal tourism businesses has expanded.** In the 2002 study, the analytical universe of the number of Aboriginal tourism businesses in Canada was 892. These 892 business entities include those of Aboriginal ownership and those that did not. In our current study, the confirmed number of Aboriginal businesses in Canada amounts to 1,708[61], and only 1,527 out of the total of 1,708 are considered majority Aboriginal owned tourism businesses (i.e., at least 51% of the business's ownership belongs to an Aboriginal entity), which is the analytical universe in our report. There was an additional 4 businesses identified that did had minor (<51%) Aboriginal ownership.
- **Direct employment of the Aboriginal tourism sector has increased.** From the 2002 study, total number of employed in the Aboriginal tourism businesses was estimated 12,566 (including employment in casinos). In our current study, the number of employed in the sector is estimated 33,112[62].
- **Direct gross output from Aboriginal tourism businesses has increased.** The 2002 study estimated that direct industry gross output from Aboriginal businesses was $2.28 billion, while our current study values direct gross output from Aboriginal tourism businesses at approximately $2.65 billion.
- **Direct GDP contribution from Aboriginal tourism sector has grown.** The 2002 study showed that direct GDP impact of Aboriginal businesses in Canada was estimated at $596 million, while direct GDP contribution of the Aboriginal tourism sector to the Canadian economy has been estimated at about $1.41 billion in our current study. It should be noted that the differences between the proportion of GDP relative to gross output in the 2002 study and our current study may be due to the differences in the underlying industry distribution within the Aboriginal tourism sector amongst these two studies.

[61] Includes majority and partially Aboriginal owned and Aboriginal themed (Government and public owned) tourism businesses.

[62] Employment forecasts are for provinces only, data on Northwest Territories was not available at the time of the report production.

8.4 Summarizing the Economic Impact of Aboriginal Tourism Sector

When a tourist spends on a tourism commodity, that amount of expenditure creates a direct requirement for the production of the tourism commodity. The economic impact does not end there though. The increased production of this commodity leads to increased production of all the intermediate goods that are used to make this tourism commodity, and the increased production of intermediate goods will in turn generate more demand for other goods and services that are used to produce these intermediate goods. Sometimes, because workers are able to earn a higher wage, they may decide to spend a portion of their extra earnings to purchase more goods and services. As such, an initial demand for a commodity creates a chain effect down the production process.

An economic impact analysis is designed to study such inter-linkage between industries in order to evaluate how a change in an initial demand for goods or services in an industry contributes to changes in other industries' level of production, and therefore changes in the overall economic activities in a region.

Aboriginal tourism activities produce the same impact in our economy and in this report we attempt to capture such impacts and compare them over time. The findings are encouraging.

Consistent with the way tourism activities are measured in the Human Resource Module of the Canadian Tourism Satellite Account, we have set out to create an Aboriginal tourism business inventory which classifies activities according to five broad industries: transportation, accommodation, food and beverage services, recreation and entertainment, and travel trade. Then the results are applied from the Aboriginal Tourism Business Survey to estimate direct employment levels in these industries in all the provinces and territories in Canada. Finally, the provincial input-output model developed by Statistics Canada to assess the direct, indirect and induced impacts of such activities using common variables such as jobs, Gross Domestic Product (GDP), and government tax revenue is applied. When economic impact analysis is done consistently over time, change can be measured, and how the changes came about.

Because of the inter-relationship amongst industries, we are able to estimate the multiplier effects of such direct benefits for Aboriginal tourism. "Simple multipliers" capture the sum of direct and indirect effects. "Total multipliers" capture the sum of direct, indirect and induced effects. The summary table below presents the results of our valuation. (Exhibit 8-7)

Exhibit 8-7: Economic Impacts of Aboriginal Tourism in Canada, 2014

Variables	Direct Impact	Simple (Direct and Indirect) Impacts	Total (Direct, Indirect and Induced) Impacts
Employment (Full Year Equivalence)	26,797	35,063	40,180
Output	$2.65 billion	$3.77 billion	$4.64 billion
GDP (Value Added)	$1.41 billion	$2.04 billion	$2.58 billion
Wages and Salaries	$0.87 billion	$1.17 billion	$1.36 billion
Government Tax Revenue	$67.4 million	$101.7 million	$145 million

**Excludes Northwest Territories, as insufficient data available at the time of report production.*
SOURCE: O'Neil Marketing & Consulting

PART 4: REGIONAL PROFILES

This section provides summaries of current information about Aboriginal tourism for each region. Each section starts with information about the size and value of Aboriginal tourism followed by a summary of secondary research available.

9 Regional Profiles

This section provides summaries of current information about Aboriginal tourism for each region. Each section starts with information about the size and value of Aboriginal tourism followed by a summary of secondary research available.

9.1 British Columbia

British Columbia has the one-third (198) of the First Nations in Canada; and the second largest Aboriginal population.

Exhibit 9-1: British Columbia Aboriginal Population

	Aboriginal identity population	Percent distribution	Aboriginal identity population as a percentage of the total population
Canada	**1,400,685**	**100%**	**4.3%**
British Columbia	232,290	16.6%	5.4%

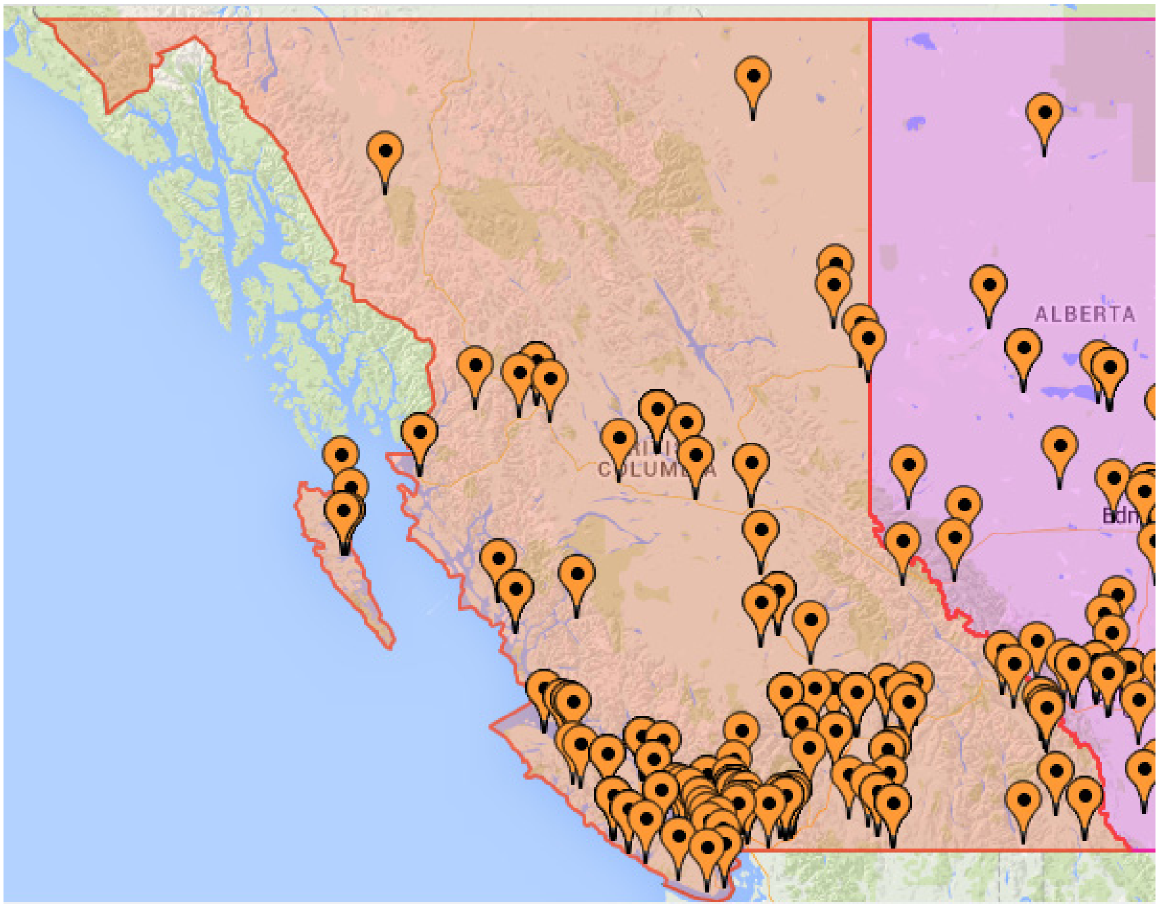
**Percent distribution of Canadian population*
SOURCE: Stats Canada 2011, www12.statcan.gc.ca/nhs-enm/2011/as-sa/99-011-x/2011001/tbl/tbl02-eng.cfm

9.1.1 Aboriginal Tourism Industry

For more than 20 years, the Province of British Columbia has worked closely with Aboriginal tourism leaders in developing the Aboriginal tourism industry – first with the First Nations Tourism Association of BC (FNTA) in the early 1990s, and then its successor, the Aboriginal Tourism Association of British Columbia (AtBC) that launched in 1996. Partnerships with the Government of BC, Canada, Destination BC, and industry, as well as ongoing communication with First Nations and operators, and monitoring of activities and economic impacts of their actions are credited as elements to the organization's success.

British Columbia's tourism organization Destination BC operates with six tourism regions and prominently feature Aboriginal tourism in its website (www.hellobc.com) with imaging on the landing page, and an exclusive Aboriginal page that is easily accessible with one click. The most common terms used to reference Aboriginal tourism are: Aboriginal and First Nations. AtBC also has its own consumer website.

Exhibit 9-2: British Columbia Aboriginal Tourism Business Locations

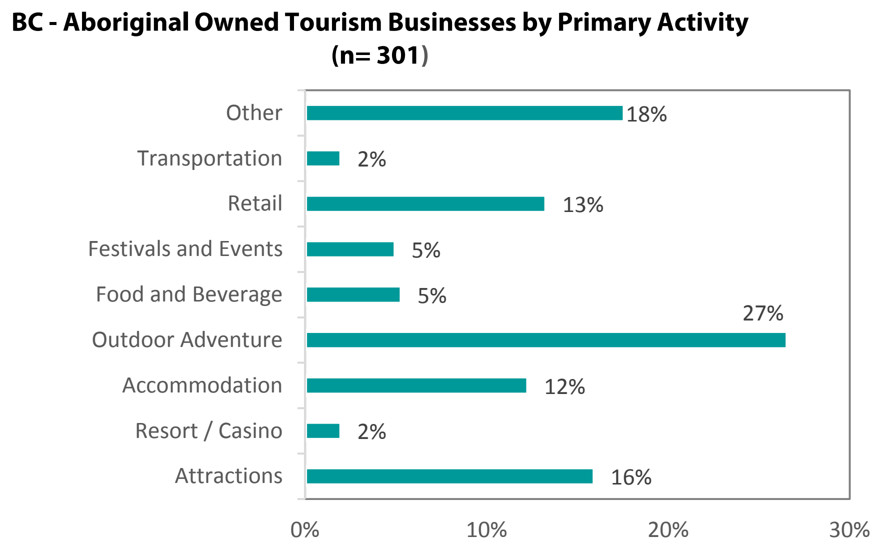


SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Size and Value

In 2014, there were 309 Aboriginal tourism businesses in British Columbia which was 18% of all Aboriginal tourism businesses in Canada. The majority (301) were Aboriginal owned, while 8 were Aboriginal themed public (government-owned facilities).

Exhibit 9-3: British Columbia Aboriginal Owned Tourism Businesses by Primary Activity



Almost a third of businesses were outdoor and adventure, 16% were attractions, 13% were retail and 12% were accommodations. Experiences are generally located where there is a strong tourism base, such as Vancouver Island and the Okanagan, and often are interpretive and sporting activities (non-hunting, non-fishing). Northern British Columbia is the provinces oil and gas/energy region, consequently having few Aboriginal tourism ventures.

These businesses generated the following total economic impacts (direct, indirect, induced).

Exhibit 9-4: Total Economic Impact British Columbia Aboriginal Tourism, 2014

	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes	% of provincial businesses that are Aboriginal	# Aboriginal Owned Tourism Businesses	Total Aboriginal Tourism Employment
British Columbia	8,443	$978,456,749	$561,433,614	$298,844,018	$30,223,495	4.3%	301	6,930

**Based on the number of Aboriginal tourism businesses identified in this study -ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014*

Secondary Research Summary

The Aboriginal Tourism Association of BC (AtBC) is a global leader in Aboriginal tourism planning, marketing and development. AtBC has conducted numerous research and planning projects over the last decade (including the groundbreaking AtBC Blueprint Strategy). The information below is a summary of the most relevant, recent research.

In 2012, AtBC published an updated strategy entitled, *The Next Phase: 2012-2017: A Five Year Strategy for Aboriginal Tourism in BC*. It contained six key, high level strategies.[63]

1) Push for Market-Readiness
2) Build and Strengthen Partnerships
3) Focus on Online Marketing
4) Focus on Key and Emerging Markets
5) Focus on Authenticity and Quality Assurance
6) Regional Approach

The strategy identified the key markets to focus on are British Columbia, Alberta, Ontario, California and Germany. Markets to monitor are China, India and Mexico.

The AtBC Blueprint Strategy Tourism Performance Audit Report 2006-2012 measured the economic performance of Aboriginal tourism between 2006 and 2010. Results indicated:[64]

- The average Aboriginal tourism incidence level (share of those visitors participating in Aboriginal tourism) was about 22% in 2010. This was 69% greater than levels existing in 2006. It is likely these unprecedented levels of Aboriginal culture exposure was associated with the 2010 Winter Olympics in hosted by the gateway cities Vancouver and Whistler.
- The number of overnight visits to British Columbia, which included some form of Aboriginal cultural tourism, increased by an estimated 97% between 2006 and 2010 to approximately 3.7 million visits, almost double the number from 2006. This growth is most pronounced among the Canadian market (+106%) which accounts for approximately half the Aboriginal cultural tourism volume.
- Overall, overnight visitors spent an estimated $40 million on Aboriginal tourism related trips in BC in 2010. This represented a doubling of 2006 levels.
- In 2010, taxes from Aboriginal tourist related spending approximated $11.3 million (to all levels of government).
- An estimated 2,900 FTE employees comprised the Aboriginal tourism businesses workforce in 2012. This represented an overall increase of 66% over 2006 levels. The greatest increases (159%) were in part-time, year round and peak season positions.

Destination British Columbia published a tourism sector profile in 2014. It summarized[65] that:

- Top target markets for BC include: Canada, United States, Germany, South Korea, United Kingdom, and France.[66] Also, British Columbia's emerging markets, China, India and Mexico, show considerable interest in Aboriginal cultural tourism and place high importance on it when choosing a destination to

[63] Aboriginal Tourism Association of British Columbia. (2012). The Next Phase: 2012-2017 A Five-year Strategy for Aboriginal Cultural Tourism in British Columbia. Aboriginal Tourism Association of British Columbia.

[64] O'Neil, B and P, Williams (2013). AtBC Blueprint Strategy Tourism Performance Audit Report 2006-2012. Prepared for Aboriginal Tourism Association of BC.

[65] Much of this information was provided to Destination British Columbia by the ATBC.

[66] Research, Planning and Evaluation Destination British Columbia (2014). Tourism Sector Profile: Aboriginal Cultural Tourism. Destination British Columbia.

visit; however, international markets are relatively unaware of Aboriginal tourism experiences in British Columbia and Canada.

- The average Aboriginal cultural tourism visitor to British Columbia tends to be female, middle to late aged, well-educated, and earns an upper-middle income.
- An Aboriginal cultural tourism visitor often includes an Aboriginal cultural tourism product or activity in their first visit to British Columba.
- Aboriginal cultural tourists tend to stay in British Columbia for an average of 13 days, with parts of 3 days participating in Aboriginal cultural tourism experiences. These visitors spend more per trip than other visitors, and stay longer.
- Aboriginal cultural tourism visitors under the age of 50 prefer active experiences such as canoeing, kayaking, dog-sledding, and horseback riding, while visitors aged 50+ prefer less vigorous experiences such as hiking, walks, nature observation, and indoor activities.

Also, a study in Northern BC found that visitors interested in Aboriginal tourism had the following characteristics:[67]

- Already likely to have participated in Aboriginal tourism activities;
- Were older, highly educated, and from North America;
- Wanted interactive/active experiences but were somewhat reluctant to participate;
- Visitors were most interested in activities like woodcarving, collection of edible plans and outdoor survival, topics that included information about animal and plant life, Aboriginal stories and legends and history post-European settlement; and
- Experience interests included taking photos, demonstrations by artists and Aboriginal drumming and dance performances.

9.2 Alberta

In Alberta, the Aboriginal population is over 220,000 people, and 48 First Nations. These First Nations are associated with a Treaty (either Treaty 6 or 7 or 8), or with the Métis community. These groups form the common communication and planning structure for many activities in Alberta.

Exhibit 9-5: Alberta Aboriginal Population

	Aboriginal identity population	Percent distribution	Aboriginal identity population as a percentage of the total population
Canada	**1,400,685**	**100%**	**4.3%**
Alberta	220,695	15.8%	6.2%

**Percent distribution of Canadian population*
SOURCE: Stats Canada 2011, www12.statcan.gc.ca/nhs-enm/2011/as-sa/99-011-x/2011001/tbl/tbl02-eng.cfm

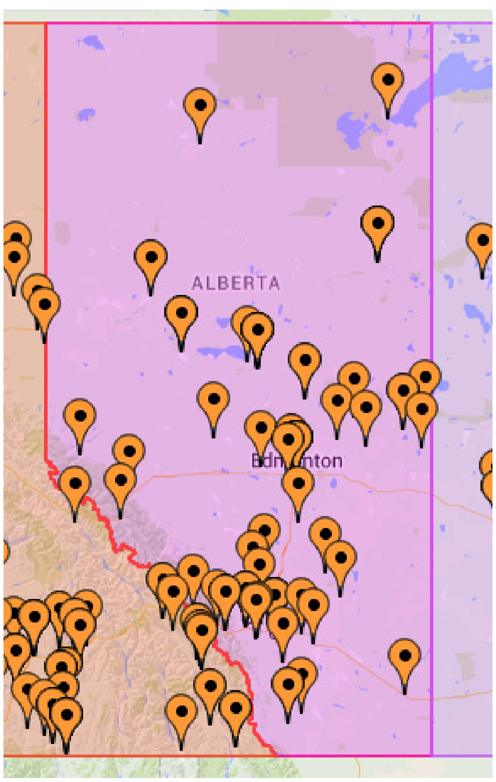
[67] D. Kutzner (200?).Aboriginal Tourism Demand in Northern BC. University of Northern British Columbia.

9.2.1 Aboriginal Tourism Industry

During the growth of Aboriginal tourism in Canada in the 1990s, Aboriginal tourism in Alberta grew first from a group of southern Alberta operators in the early 90s who called themselves the Aboriginal Tourism Authority of Alberta, which was then replaced in the mid 1990s by the Niitsitapi Tourism Society of Alberta. From 1998 to 2003, Niitsitapi had the mandate to promote Aboriginal tourism development through a formal membership system, and provided marketing support and business management advisory services, with minimal Alberta Government involvement. This five year period was critical to launching Alberta Aboriginal tourism; Niitsitapi provided operator services and was the link between industry and operators. Without sufficient resources and commitment or engagement by the Alberta Government, Niitsitapi closed. Following this, the Alberta Government developed some Aboriginal tourism strategies and promoted Aboriginal themed tourism experiences, including Aboriginal tourism activities in its promotional activities.

The provincial travel organizations, Travel Alberta, has six tourism regions. Its website (www.travelalberta.com) identifies Aboriginal tourism activities to do under the heading "Things to Do", and commonly uses the terms First Nations to identify Aboriginal tourism, with Aboriginal being the second most used term. The Aboriginal exclusive page takes two clicks to reach.

Exhibit 9-6: Alberta Aboriginal Tourism Business Location

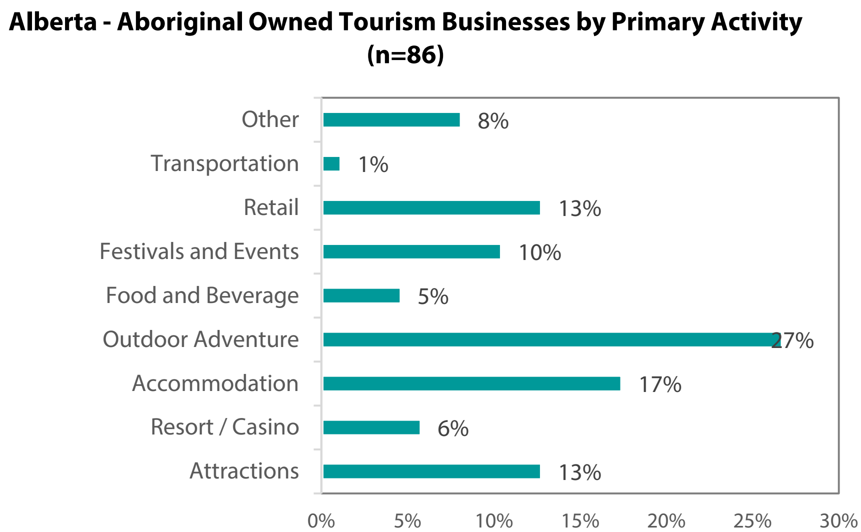


SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Size and Value

In 2014, there were 140 Aboriginal tourism businesses in Alberta, which was 8% of all Aboriginal tourism businesses in Canada. The majority (86) of businesses was Aboriginal owned, while 54 were Aboriginal themed public (government-owned facilities).

Exhibit 9-7: Alberta Aboriginal Owned Tourism Businesses by Primary Activity



Almost a third (27%) of businesses was outdoor and adventure, 17% were accommodations, 13% were attractions, and 13% were retail. Many of the business are located around urban centers and major highway corridors.

These businesses generated the following total economic impacts (direct, indirect, induced).

Exhibit 9-8: Total Economic Impact Alberta Aboriginal Tourism, 2014

	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes	% of provincial businesses that are Aboriginal	# Aboriginal Owned Tourism Businesses	Total Tourism Employment
Alberta	2,272	$296,020,401	$169,812,591	$92,821,569	$7,971,655	4.2%	86	2,065

**Based on the number of Aboriginal tourism businesses identified in this study -ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014*

Secondary Research Summary

A 2013 study of urban Albertans (e.g., Calgary, Edmonton) participation in rural vacation experiences (in Alberta) found the following facts about Aboriginal tourism:[68]

- Overall, on the last rural trip, only about 3% of urban Albertans participated in Aboriginal tourism (2% experienced Aboriginal culture and 1% shopped for authentic Aboriginal arts and crafts).
- In terms of preferred trip experiences, overall, just under a fifth indicated that Aboriginal tourism would be an ideal activity on a same-day (18%) or overnight trip (17%). More urban Albertans replied they preferred experiencing Aboriginal culture (13%) compared to shopping for authentic Aboriginal arts and crafts (11%).
- Only a few respondents felt that improvement in Aboriginal tourism experiences would encourage more visitation to rural Alberta. Those that did, felt improvements needed more immersive (participatory) experiences, more information about what to expect and more publicity (marketing).

Overall, results indicated that in Alberta potential exists to draw visitors to Aboriginal experiences, although it is still a niche product.

In 2010, an opportunity analysis was conducted for Aboriginal tourism in Alberta. The study summarized past research and concluded that:[69]

- Canadians and Americans that participated in Aboriginal tourism were most likely to do so in rural settings, were mature and well-educated, were likely to participate in other cultural activities while travelling, and are very interested in soft outdoor activities.
- Long-haul Aboriginal cultural travelers in North America were likely to have sought out vacations that are associated with exploration, visiting historical sites and sports and learning and sightseeing activities. They are also likely to have toured in their own personal vehicle and camped in a public campground or stay in a lakeside or wilderness lodge or remote fly in lodge.
- In terms of potential barriers to development, overall it was identified that there is a general lack of product development and readiness, specifically:
    1) Limited funding and access to capital;
    2) Limited awareness and inadequate marketing of the Aboriginal tourism industry in Alberta;
    3) Limited experience and training in tourism business management;
    4) Limited understanding of the market for Aboriginal tourism; and
    5) Social issues such as band politics and labour force attitudes.

9.3 Prairies – Saskatchewan and Manitoba

The Aboriginal population in the provinces of Saskatchewan and Manitoba totals over 350,000 people, which represents a quarter (25.2%) of the Aboriginal population in Canada.

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[68] Infact Research and Consulting Inc. (2013). Potential Demand for Rural Vacation Experiences in Alberta by Residents of Alberta Quantitative Research. Alberta Tourism, Parks and Recreation.

[69] Outlook Market Research and Consulting Ltd (2010). Opportunity Analysis for the Viability of Aboriginal Tourism in the Alberta Hub Region. Alberta Hub.

Exhibit 9-9: Prairies Aboriginal Tourism Population (Saskatchewan and Manitoba)

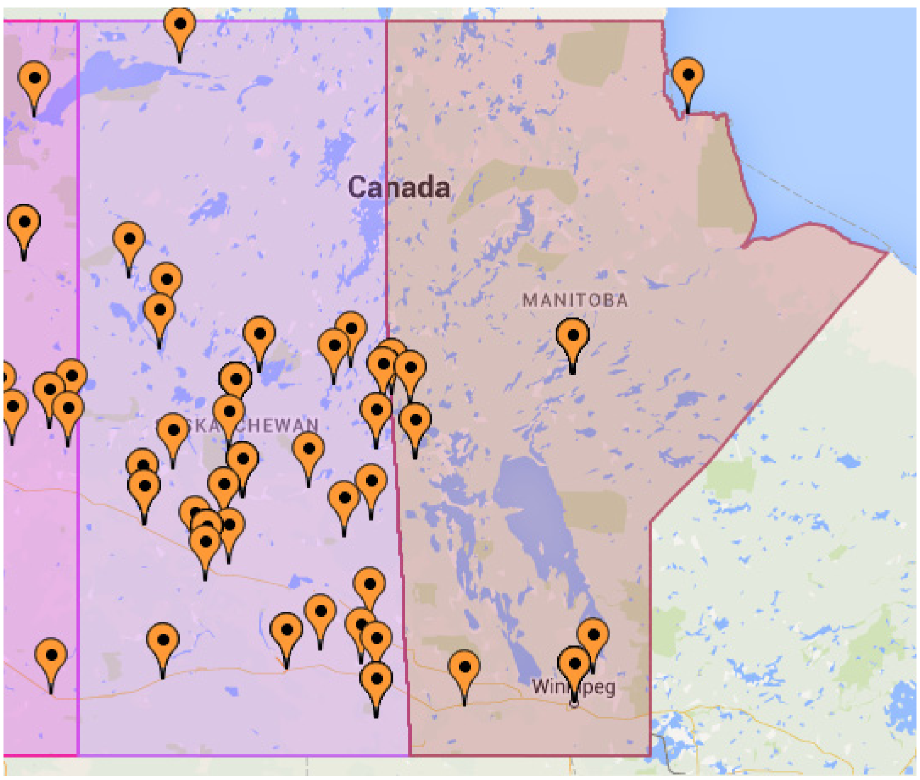
	Aboriginal identity population	Percent distribution	Aboriginal identity population as a percentage of the total population
Canada	**1,400,685**	**100%**	**4.3%**
Saskatchewan	157,740	11.3%	15.6%
Manitoba	195,900	14.0%	16.7%
TOTAL	**353,640**	**25.2%**	**16.2%**

**Percent distribution of Canadian population*

SOURCE: Stats Canada 2011, www12.statcan.gc.ca/nhs-enm/2011/as-sa/99-011-x/2011001/tbl/tbl02-eng.cfm

In Saskatchewan there are 70 First Nations, and Manitoba 63 First Nations.

Exhibit 9-10: Prairies Aboriginal Tourism Businesses Location (Saskatchewan and Manitoba)



SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

9.3.1 Aboriginal Tourism Industry

Both Saskatchewan and Manitoba had established provincial Aboriginal tourism organization, and as with most other regions, these regional organizations also closed primarily for reasons of lack of resources. At present there are no provincial organizations proposed for Saskatchewan or Manitoba, although there is continued awareness and support for Aboriginal tourism in these provinces. Manitoba has demonstrated their continued interest in

Aboriginal tourism through completing the first phase of an Aboriginal tourism strategy in 2003, and core funding a localized economic development initiative in 2007. The Eastside Aboriginal Sustainable Tourism (EAST) initiative is mandated to develop and expand Aboriginal tourism on the eastside of Lake Winnipeg. The predecessor to these two initiatives is the Manitoba Aboriginal Tourism Association in the late 1990s; however, it perished a few years later. Other than these initiatives in Manitoba, there are no other Aboriginal tourism-focused organizations in the remainder of the province today.

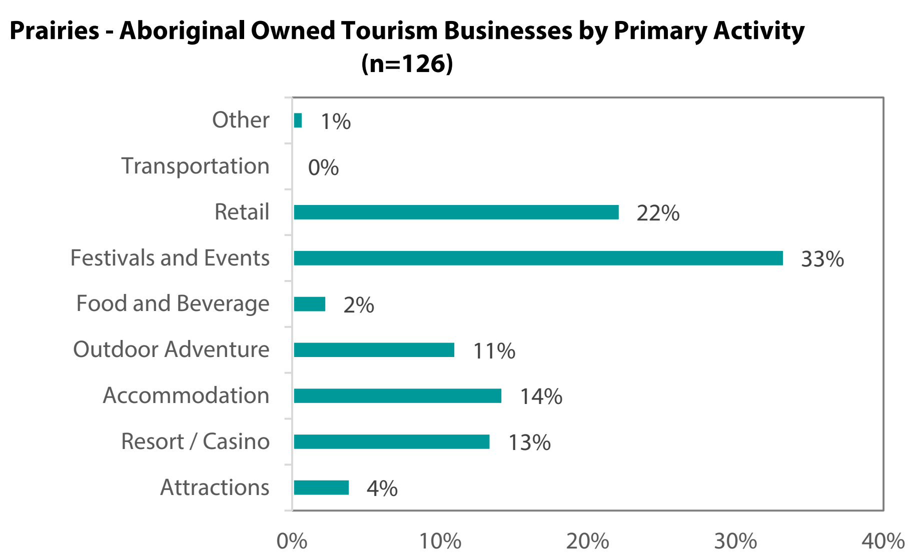
Saskatchewan tourism is organized into three tourism regions. The provincial tourism website, Discover Saskatchewan (www.tourismsaskatchwan.com) has an Aboriginal exclusive page, which is accessible by two clicks. It also lists historical and cultural information with recommended learning tours. The most common terms used are First Nations and Métis.

Travel Manitoba (www.travelmanitoba.com) has eight tourism regions, and primarily uses the term "First Nations" to identify Aboriginal tourism. There is no Aboriginal exclusive page; however, Aboriginal tourism information is accessible by two clicks from the landing page.

Size and Value

In 2014, there were 194 Aboriginal tourism businesses in the Prairies (Manitoba and Saskatchewan) which were 11% of all Aboriginal tourism businesses in Canada. The majority (126) were Aboriginal owned, while 68 were Aboriginal themed public (government-owned facilities). Manitoba's listing of Aboriginal tourism experiences inventory featured on historic and cultural sites, and publicly owned museums featuring Aboriginal culture.

Exhibit 9-11: Prairies Aboriginal Owned Tourism Businesses by Primary Activity



Almost a third (33%) of businesses was festivals and events, 22% were retail, 14% were accommodations and 13% were resorts/casinos. Saskatchewan has a higher number of casino/resorts than other provinces and territories which can be attributed to the relationship between First Nations and the Saskatchewan Government which in the 1990s passed landmark legislation enabling First Nations to add crown and municipal land to reserve, and participate in gaming.

These Aboriginal tourism businesses generated the following total economic impacts (direct, indirect, induced).

Exhibit 9-12 Total Economic Impact Prairies Aboriginal Tourism

	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes	% of provincial businesses that are Aboriginal	# Aboriginal Owned Tourism Businesses	Total Aboriginal Tourism Employment
Saskatchewan	2,785	$300,634,558	$162,326,639	$80,748,117	$9,490,934	3.0%	82	2,728
Manitoba	1,226	$130,226,259	$74,904,488	$38,614,358	$5,326,340	4.0%	44	1,101
TOTAL	**4,011**	**$430,860,817**	**$237,231,127**	**$119,362,475**	**$14,817,274**	**3.3%**	**126**	**3,829**

**Based on the number of Aboriginal tourism businesses identified in this study -ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014*

Secondary Research Summary

- ***Saskatchewan***

Studies on Saskatchewan tourism markets or strategies were not made available to this project; further, there was no information available on Aboriginal tourism in Saskatchewan.

- ***Manitoba***

A case study outlined the process to build the northwest Manitoba in a regional tourism strategy. This strategy development resulted in a new level of partnership and cooperation. The case study identified eight best practices for Aboriginal tourism development.

Manitoba Aboriginal Tourism Best Practices

1) Build rapport and trust
2) Adopt regional planning and focus-down perspectives
3) Have strong leadership
4) Implement a community visioning and strategic planning process
5) Operate by consensus decision-making
6) Promote partnership equity and opportunity
7) Focus on sustainability
8) Create a parallel process of funders

As mentioned, the Government of Manitoba in 2003, prepared an Aboriginal tourism strategy which outlines the approach to developing Aboriginal tourism in the province. The strategy outlined three broad concepts:[70]

1) Creation of a critical mass of attractions (cluster development) on successful developments and natural attractions;
2) Training for managers, staff and community; and
3) Marketing.

Phase 2 (the implementation phase) of Manitoba's Aboriginal tourism strategy has not yet been completed.

9.4 Ontario

In April 2014, the creation of Aboriginal Tourism Ontario was announced; however, while there is interest expressed from the Ontario Ministry of Tourism, ATO is not yet fully functional.

In Ontario, there are 139 First Nations, the second largest number in Canada, and the highest percentage Aboriginal population in the provinces.

Exhibit 9-13: Ontario Aboriginal Tourism Population

	Aboriginal identity population	Percent distribution	Aboriginal identity population as a percentage of the total population
Canada	**1,400,685**	**100%**	**4.3%**
Ontario	301,425	21.5%	2.4%

**Percent distribution of Canadian population*
SOURCE: Stats Canada 2011, www12.statcan.gc.ca/nhs-enm/2011/as-sa/99-011-x/2011001/tbl/tbl02-eng.cfm

9.4.1 Aboriginal Tourism Industry

In the 1990s, a Northern Ontario Native Tourism Association (NONTA) facilitated and marketed Aboriginal tourism in northern Ontario. Later in the mid 1990s, Aboriginal Tourism Association of Southern Ontario (ATASO) became established to focus on strengthening Aboriginal tourism in the south. However, in early 2000, both organizations perished leaving the north and south regions without Aboriginal tourism services.

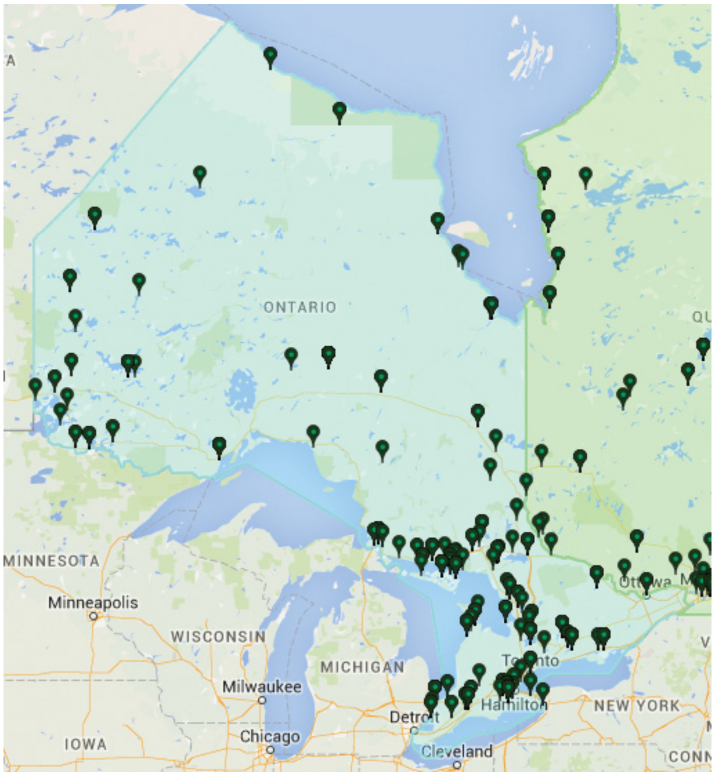
Since then, there have been three initiatives supporting Aboriginal tourism participation in southern Ontario: 1) based in Ottawa, an urban Aboriginal cultural attraction called *Aboriginal Experiences* that offers performances, foods, and coordinates a major festival; 2) headquartered on Manitoulin Island, the *Great Spirit Circle Tour* offers nature-based, cultural, eco-tourism, and educational tours; and 3) *Six Nations Tourism Association* (under Six Nations Economic Development) promotes and facilitates tourism development in Six Nation traditional lands.

Ontario Travel (www.ontariotravel.net) has 15 tourism regions, and prominently features Aboriginal tourism on its landing page with a listing in the drop down page through "Play". Information on Aboriginal tourism

[70] H. N. Westdal & Associates (2003). Mapping New Territory: Aboriginal Tourism Strategy for Manitoba. Phase 1 Discussion Paper. Travel Manitoba.

activities are recommended with links to "Great Spirit Circle Trail". The common term used is Aboriginal. Aboriginal tourism information is accessed by one click from the home page.

Exhibit 9-14: Ontario Aboriginal Tourism Businesses Location



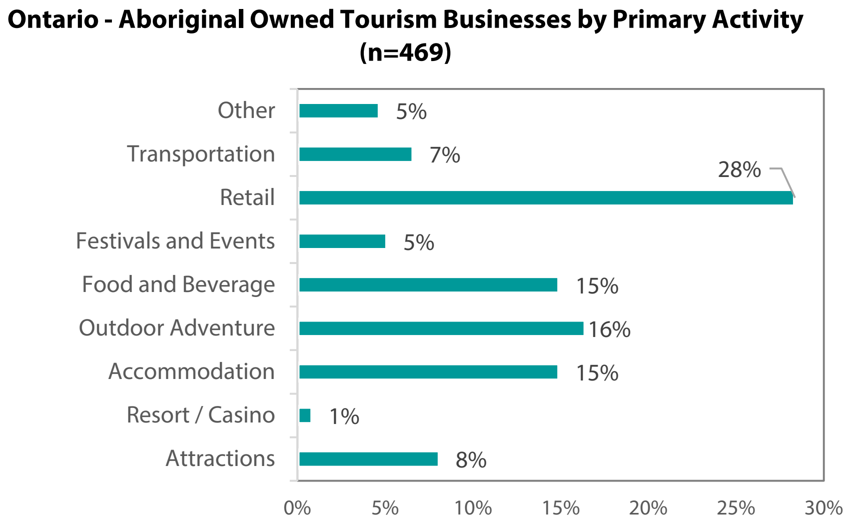
SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Size and Value

In 2014, there were 479 Aboriginal tourism businesses in the Ontario which was 28% of all Aboriginal tourism businesses in Canada. This was up from the 26% in 2001. The majority (469) were Aboriginal owned, while 10 were Aboriginal themed public (government-owned facilities). The large increase in the number of businesses may be attributed to data collection. In 2001, the business inventories typically focused on the primary tourism sectors – accommodations, outdoor adventure, food and beverage, and transportation; usually leaving out festivals and events, and retail. In 2014, a comprehensive list of Aboriginal businesses in Ontario was developed, which was not conducted in 2001 or 1997.[71]

[71] Great Spirit Circle Trail (the lead organizers of the Aboriginal Tourism Ontario) received funds to develop a comprehensive list of Aboriginal businesses in Ontario. They contacted each First Nation which resulted in a list of more than 1600 businesses.

Exhibit 9-15: Ontario Aboriginal Owned Tourism Businesses by Primary Activity



Almost a third (28%) of businesses was retail, 16% were outdoor and adventure, 15% were accommodations and 15% were food and beverage. Businesses in northern Ontario are typically outdoor adventure usually fishing and hunting which reflect the traditional activities many northern First Nations and Aboriginal people still live, while in southern Ontario, First Nation communities are larger and offer more retail (gift shops, gas stations), food and beverage, and accommodations.

These businesses generated the following total economic impacts (direct, indirect, induced).

Exhibit 9-16: Total Economic Impact Ontario Aboriginal Tourism, 2014

	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes	% of provincial businesses that are Aboriginal	# Aboriginal Owned Tourism Businesses	Total Aboriginal Tourism Employment
Ontario	14,044	$1,729,872,333	$957,410,568	$497,126,061	$63,211,888	4.2%	469	11,108

**Based on the number of Aboriginal tourism businesses identified in this study -ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014*

Secondary Research Summary

The Ontario Tourism Marketing Partnership Corporation (OTMP)[72] provided a summary of information about Canadians that included Aboriginal events in their trips in 2010. This information was compiled using results from the Travel Survey of Residents of Canada and found that:

[72] Ontario Tourism Marketing Partnership Corporation (2014). Custom PowerPoint Presentation Statistics about Aboriginal Tourism in Ontario. Ontario Tourism Marketing Partnership Corporation.

- Ontario experienced the highest (of all provinces) number of trips that included attending an Aboriginal event (208K) by Canadians. This equals about one-third of all Aboriginal event attendance in Canada. This result is expected as Ontario benefits from the most domestic tourism demand in Canada;
- However, trips from within Canada that included Aboriginal events make up only 0.2% of domestic tourism overall for the province; and
- Total expenditures on trips that included attending an Aboriginal event in Ontario was $52M in 2010. In 2007, total expenditures on trips that included attending an Aboriginal event in Ontario was $71M.

A 2012 study of Ontario's key markets (Ontario, Quebec, Manitoba and the USA) found that only 2% of travelers experienced Aboriginal culture while travelling over the past year. Virtually none of those travelers indicated it was the main reason for their trip.

In 2014, the Great Spirit Trail Circle conducted a survey of Aboriginal tourism businesses in northern Ontario (region 13), 75 were distributed and 46 responded.[73] Key findings are listed below.

- 67% of businesses believed receiving support from an Aboriginal tourism association provides value.
- 91% believe they are NOT market-ready, and only a small proportion believed they were ready to do business with national (16%) or international (11%) markets.
- About 22% of businesses fully understand the role of receptive tour operators, 44% replied they 'somewhat' understand the role.
- Under half (44%) of businesses were able to provide pricing and program details at least 6 months in advance.
- To become market-ready, businesses felt they needed the support in marketing (34%), finding qualified staff (31%), training and business development (30%), or other areas (4%).
- The majority of businesses are very small and employ 1-2 staff (48%), or 2-4 staff (9%), although 27% employed more than eight staff.
- About two-thirds (67%) of businesses have been operating for more than 5 years, 21% were 1-2 years old, while 12% were 3-5 years old.
- The top five challenges to being competitive were – marketing/funding (21%), travel distances (15%), pricing (9%), services (9%), and skilled workforce (9%).
- A third of businesses believed partnerships with other First Nations businesses would help grow their business, while fewer believed partnerships with financing organizations (19%), marketing organizations (13%), and tour operators (9%) would help grow their business.
- The top four training and employment programs that would most benefit tourism businesses were customer service (24%), business supports (16%), management (11%) and heritage/land (11%).

The 2011 Aboriginal tourism strategic plan for Ontario outlined four broad directions for action. [74]

1) Human resource development

[73] The Great Spirit Circle Trail (2014). Tourism Northern Ontario - Final Report. Tourism Northern Ontario.

[74] The Great Spirit Circle Trail (2011). Aboriginal Tourism Strategy: Moving Forward in 4 Directions. Aboriginal Tourism Ontario and Ontario Ministry of Tourism and Culture.

2) Marketing and branding
3) Cultural authenticity
4) Product development

9.5 Quebec

In Quebec there is over 140,000 Aboriginal people, and 55 Aboriginal communities divided amongst 11 Indigenous Nations (10 First Nations and 1 Inuit Nation). The two official languages in Quebec are English and French; however, while many First Nations people are bi-lingual, the second language spoken is typically their traditional First Nation language. Although many youth speaks their native language as a second language after French or English, many Elders kept their native language as their mother tongue. Further, Quebec has the highest number of individuals (40,000) who speak Aboriginal languages in Canada.[75] It also has the fewest English speakers (17%)[76], and 82% of the population speaks mostly French at home.

Exhibit 9-17: Quebec Aboriginal Population

	Aboriginal identity population	Percent distribution	Aboriginal identity population as a percentage of the total population
Canada	**1,400,685**	**100%**	**4.3%**
Quebec	141,915	10.1%	1.8%

**Percent distribution of Canadian population*
SOURCE: Stats Canada 2011, www12.statcan.gc.ca/nhs-enm/2011/as-sa/99-011-x/2011001/tbl/tbl02-eng.cfm

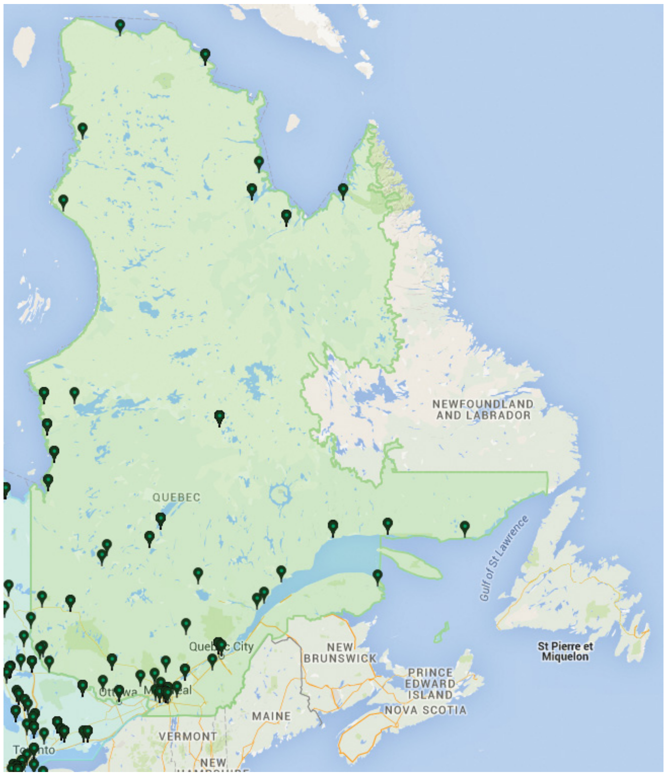
9.5.1 Aboriginal Tourism Industry

Quebec has the longest standing Aboriginal tourism organization in Canada. Established in 1991, the organization has an ongoing relationship with the Government of Quebec and the provincial tourism organization. The organization serves 55 different Aboriginal communities having expanded from its original focus of Innu Nation, and then expanding to include the full 11 provincial Nations a couple years after opening.

Quebec tourism has 22 tourism regions, and promotes tourism through the www.bonjourquebec.com website in both official languages – French and English. The common terms used are the French words Autochtone (meaning Aboriginal) and Indigène (meaning Native), and in English the term First Nation. Information on Aboriginal tourism takes two clicks to access from the landing page, to the exclusive Aboriginal tourism website. The website also links to Tourism Autochtone Québec.

[75] http://www.pch.gc.ca/eng/1358868579399/1358868857421
[76] http://www.pch.gc.ca/eng/1358868579399/1358868857421

Exhibit 9-18: Quebec Aboriginal Tourism Business Location

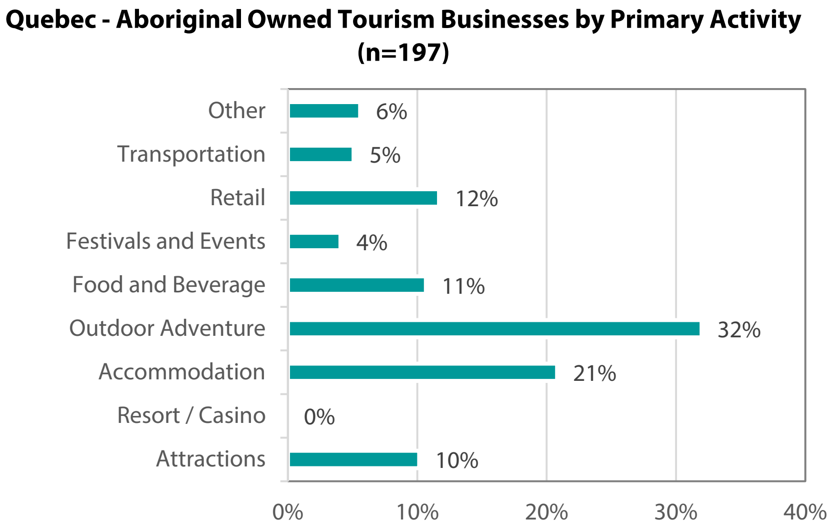


SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Size and Value

In 2014, there were 198 Aboriginal tourism businesses in Quebec which was 13% of all Aboriginal tourism businesses in Canada. This was down from the 14% in 2001. Almost all (197) were Aboriginal owned, while one identified was Aboriginal themed (public /government-owned facilities).

Exhibit 9-19: Quebec Aboriginal Owned Tourism Businesses by Primary Activity



Almost a third (32%) of businesses was outdoor and adventure, 21% were accommodation, 12% were retail and 10% were attractions. Most experiences are located on coasts or follow waterways, with a large number being concentrated in or around major centers, such as Montreal and Québec City.

These businesses generated the following total economic impacts (direct, indirect, induced).

Exhibit 9-20: Total Economic Impact Quebec Aboriginal Tourism

	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes	% of provincial businesses that are Aboriginal	# Aboriginal Owned Tourism Businesses	Total Aboriginal Tourism Employment
Quebec	5,084	$526,130,129	$303,549,100	$157,079,790	$12,069,766	4.4%	197	4,428

**Based on the number of Aboriginal tourism businesses identified in this study -ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014*

Secondary Research Summary

A 2010 economic impact study of Aboriginal tourism in Quebec revealed growth in the sector.[77]

- There were about 816,000 visitors to Aboriginal tourism businesses in 2010.
- About 50 more Aboriginal tourism businesses in 2010 (total 198) than 2002.
- A 65% increase in economic impacts between 2002 and 2010 ($169 million).

[77] Desjardins Marketing Strategique Inc. (2011). Étude 2011 de retombées économiques du tourisme autochtone. Tourisme Autochtone Québec.

- 3,434 FTEs[78] in 2010 which represents a 10% growth in employment since 2002.
- There was higher average annual business revenue ($600,000) in 2010 compared to 2002 ($340,000). This was in part, due to a longer operating season, since businesses responded they were open for more days in 2010 compared to 2002.
- In 2010, businesses were concentrated in the most lucrative activity sectors such as accommodations, outfitters, restaurants and excursions compared to cultural attractions and activities, which dominated in 2002.
- In terms of markets, the study found that 59% of visitors to Aboriginal tourism were residents of Quebec, 18% were Europeans, 15% were Americans, 8% were Canadians from outside of Quebec and 8% were from other countries. In 2010 compared to 2002, Aboriginal tourism businesses attracted more Quebec and American visitors while visitors from Europe and other overseas markets decreased. The number of visitors from other provinces of Canada remained relatively stable.
- The Quebec Ministry of Tourism has invested in key characteristics of travelers in key markets (France, United Kingdom, United States (by region), Ontario and Quebec). Among other activities, the study investigated participation in Aboriginal tourism as an activity on trips, attractiveness as an activity, and if the activity was attractive enough to be a primary activity. Key findings indicated:[79]
  - French travelers (21%) were most likely to participate in Aboriginal tourism on trips, followed by travelers from Ontario (9%) and the southern USA (8%).
  - Travelers from Quebec (4%), the central USA (4%) and New England (USA 4%) were least likely to participate in Aboriginal tourism.
  - Travelers in France (37%), the United Kingdom (30%) and the southern USA (25%) were most likely to state that Aboriginal tourism was an attractive trip activity. Similarly, travelers in France (78%), the southern USA (67%) and the United Kingdom (66%) were most likely to state that Aboriginal tourism was attractive enough to be the primary reason for a trip.
  - Overall, most travelers in key markets interested in Aboriginal tourism were between 25-44 years old (except French were older – 45-64 years old), employed and had university education.

Tourism Quebec conducted research on Aboriginal tourism in 2010. The study identified five actions to be completed.

1) Determine a vision for Aboriginal tourism.
2) Cultivate the Tourism Autochtone Québec as an organization – recognize a general shift from marketing to product development.
3) Support business development through education and coaching – push to market-ready standards.
4) Develop products sought by consumers that is authentic, tied to the environment, physical and engages learning. Also there is a gap in the authentic product in Montreal.

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[78] FTEs is full-time employment.

[79] Strategic Knowledge, Quebec Ministry of Tourism. Cultural product output, custom excel sheet (2014). Quebec Ministry of Tourism.

5) Create a working table on Aboriginal Tourism (La table Table de concertation sur le tourisme autochtone).[80]

9.6 Atlantic/Maritimes

Aboriginal people total nearly 95,000 people in Atlantic Canada, and represent 6.7% of the Aboriginal population in Canada. There are 34 First Nations – 15 in New Brunswick, 2 in Prince Edward Island, 13 in Nova Scotia, and 4 in Newfoundland/Labrador.

Exhibit 9-21: Atlantic/Maritimes Aboriginal Population

Provinces and territories	Aboriginal identity population	Percent distribution	Aboriginal identity population as a percentage of the total population
Canada	**1,400,685**	**100%**	**4.3%**
Newfoundland and Labrador	35,800	2.6%	7.1%
Prince Edward Island	2,230	0.2%	1.6%
Nova Scotia	33,845	2.4%	3.7%
New Brunswick	22,615	1.6%	3.1%
TOTAL	**94,490**	**6.7%**	**4.1%**

**Percent distribution of Canadian population*

SOURCE: Stats Canada 2011, www12.statcan.gc.ca/nhs-enm/2011/as-sa/99-011-x/2011001/tbl/tbl02-eng.cfm

9.6.1 Aboriginal Tourism Industry

As in most provinces and territories in Canada, in 2002 in Atlantic Canada there was a newly established regional Aboriginal tourism organization. The Atlantic Aboriginal Tourism Association, like others during that period, had a lot of momentum and was able to get started, but as like other RATAs, perished not long after. In the last couple years, there has been action to setup another regional Aboriginal tourism organization; however, it has not launched.

Of the provincial tourism websites, Aboriginal tourism has varying presence.

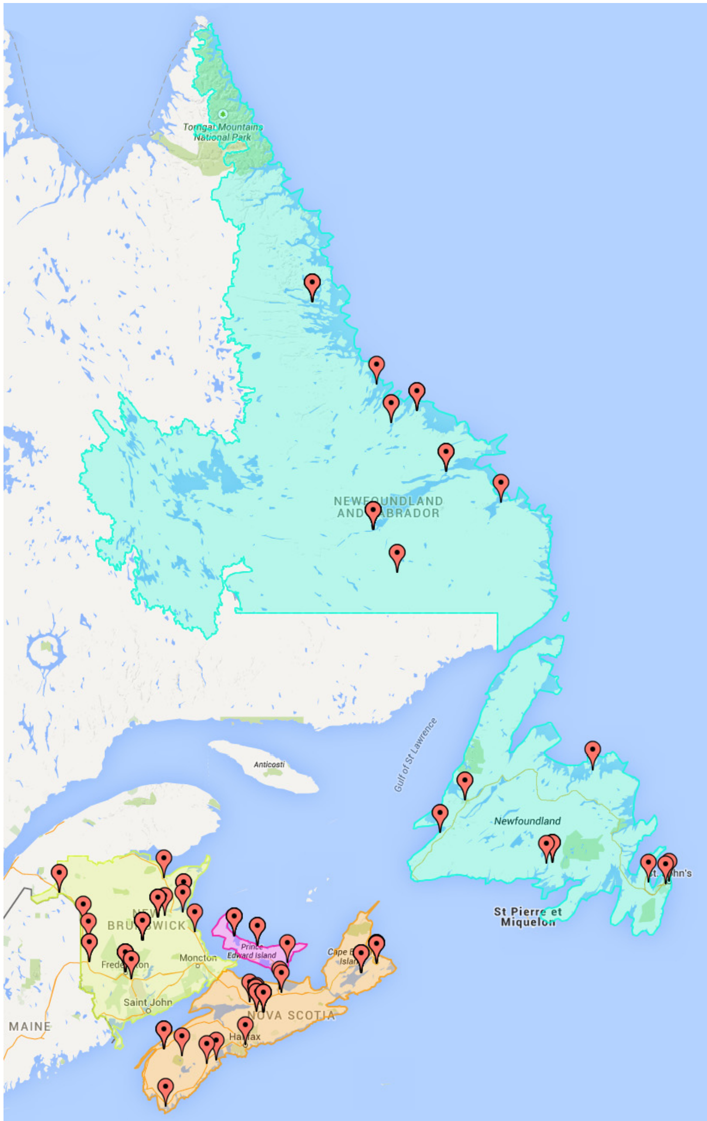
- **New Brunswick** tourism has five tourism regions, promoted through the www.tourismnewbrunswick.ca website. It takes two clicks from the landing page to access the Aboriginal tourism webpage titled "Mi'kmaq". The website also recommends Aboriginal themed itineraries. The most common term is First Nation, followed by Aboriginal.
- **Prince Edward** Island has four tourism regions, promoted through the website www.tourismpei.com. To access Aboriginal tourism information, you must use the search engine to locate the pages as there is no webpage exclusive to Aboriginal tourism. The common terms are Indian and Native.
- **Nova Scotia** has seven tourism regions, promoted through the www.novascotia.com travel website. Information on Aboriginal tourism is found after two clicks from the landing page under the drop down heading "Explore" to access the information "Mi'kmaq culture". Arts and cultural packages include the

[80] http://www.quebecAboriginal.com/nouvelles/roundtable-on-Aboriginal-tourism/

listing “Discover Mikmaw Traditions” suggesting activities to do. The most common term used is Indian and Native on the website.

- **Newfoundland/Labrador** has five tourism regions, and is promoted through the www.newfoundlandlabrador.com website. Information on Aboriginal tourism is accessed by one click, however, there is no Aboriginal exclusive page and imagery is scarce. There is information on the about Aboriginal tourism through menus ABOUT THIS PLACE, HISTORY, PEOPLE & CULTURE. The common terms used are Native (other terms searched were unreliable).

Exhibit 9-22: Atlantic/Maritimes Aboriginal Tourism Businesses Location



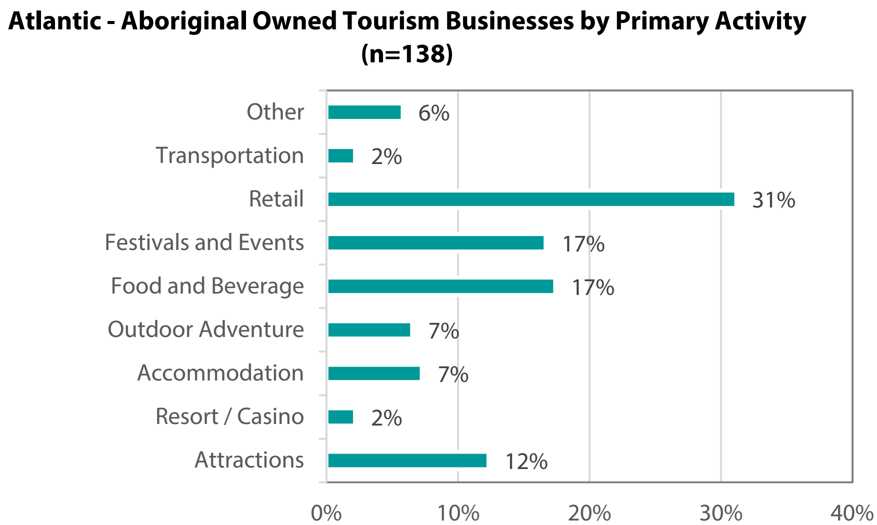
SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Presence of Aboriginal tourism in provincial tourism websites varies – some sites having Aboriginal tourism images and information easily accessed under activities pages (e.g., "things to do"), yet none having an image on their home page.

Size and Value

In 2014, there were 143 Aboriginal tourism businesses in the Atlantic/Maritimes region which was 8.2% of all Aboriginal tourism businesses in Canada. This was up from the 5% in 2001. Almost all (138) were Aboriginal owned, while 5 was Aboriginal themed public (government-owned facilities). In northern Newfoundland and Labrador, the businesses primarily service oil and gas, mining and forestry industries, yet have potential for greater involvement in tourism. The Nunatsiavut Government (regional Indigenous Government) also demonstrates its support having established Tourism Nunatsiavut. In other Maritime regions, tourism businesses were driven by major attractions, such as heritage or gaming entertainment centers, which created opportunities for other Band owned business and Band member owned experiences.

Exhibit 9-23: Atlantic/Maritimes Aboriginal Owned Tourism Businesses by Primary Activity



More than three tenths (31%) of business were retail, 17% were festivals and events, 12% were attractions, and 7% were outdoor and adventure.

These businesses generated the following total economic impacts (direct, indirect, induced).

Exhibit 9-24: Total Economic Impact Atlantic/Maritimes Canada Aboriginal Tourism, 2014

	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes	% of provincial businesses that are Aboriginal	# Aboriginal Owned Tourism Businesses	Total Aboriginal Tourism Employment
New Brunswick	1,549	$152,212,948	$80,037,134	$44,140,437	$5,509,317	3.2%	47	1,459
Prince Edward Island	415	$29,168,316	$16,222,277	$7,710,929	$832,002	3.4%	11	320
Nova Scotia	1,001	$90,417,277	$54,618,093	$29,342,205	$3,349,642	4.1%	38	922
Newfoundland/ Labrador	2,337	$158,042,799	$81,228,604	$45,257,839	$3,763,535	4.0%	42	1,054
TOTAL	**5,302**	**$429,841,340**	**$232,106,108**	**$126,451,409**	**$13,454,495**	**3.7%**	**138**	**3,755**

**Based on the number of Aboriginal tourism businesses identified in this study -ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014*

Secondary Research Summary

- ***Newfoundland and Labrador***

The 2011 Labrador Travel Survey[81] provided some insight into traveler's perceptions of Aboriginal tourism.

- Both Island residents and non-residents were asked about their level of interest in a number of the special interest forms of travel, including Aboriginal tourism. Results demonstrated that there is a greater level of interest in Aboriginal tourism among non-residents (32% ranked in 8+/10 on a level of interest scale) than residents (22%). For non-residents, the level of interest rated above other activities like fishing (25%), geo-tourism (20%), hunting (8%) and spiritual tourism (6%) but below nature-based (61%), general cultural tourism (60%), adventure travel (53%) and ecotourism (42%).
- Further, Island residents and non-residents were asked about how Labrador rated as a destination (scale 1-10) for various forms of special interest travel. For non-residents, Aboriginal tourism (42% rated it 8+/10 as a destination for Aboriginal tourism) ranked above spiritual tourism (21%), but below all other forms of special interest travel (fishing at 72%, nature-based at 81%, adventure at 68%, hunting at 64%, culture at 57% and geo-tourism at 54%).
- Similarly, residents ranked Aboriginal tourism (51%) above spiritual tourism and ecotourism (45%), and geo-tourism (41%), but below fishing (83%), nature-based (71%), adventure (56%), hunting (66%), and cultural tourism (60%).

The Nunatsiavut Government (Tourism Nunatsiavut) has invested in a comprehensive tourism strategic plan that will guide the development of tourism for the Labrador Inuit.[82] The 2014 refreshed strategic plan identifies five strategic pillars for action.

1) **Preserve and celebrate the Labrador Inuit of Canada:** Nunatsiavut has the unique potential to tell Canada's Inuit story while preserving and sharing their history.
2) **Focus on the visitor economy:** The visitor economy focuses on everything that attracts visitors to a destination; everything that makes a place special, distinctive and capable of engendering pride and interest in a place worth visiting.
3) **Tourism is one element of a sustainable community:** The ability to develop a viable tourism industry will only be as strong as the communities who welcome guests, and the businesses and people who create and sell memorable visitor experiences.
4) **Collaborate to compete:** Building a tourism industry requires a strong synergistic relationship with community economic development, inter-community collaboration, and a shared vision, complete with business models and networks within, and between the Nunatsiavut communities.
5) **Operational excellence:** Operational excellence reflects the efficiency and effectiveness of the Nunatsiavut Government's investments in tourism, and specifically, the Department of Culture, Recreation and Tourism and the projects they fund and / or support.

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[81] MQO Research Recherche (2012). Final Report – 2011 Labrador Travel Survey. Department of Tourism, Culture and Recreation Government of Newfoundland and Labrador.

[82] The Tourism Cafe Canada & Brain Trust Marketing & Communications (2014). Nunatsiavut's Tourism Strategy 2014 - 2020. Adventures & Mysteries of the Labrador Inuit. Nunatsiavut Government.

- ***Prince Edward Island***

Market research in Prince Edward Island (PEI) studied the potential for Aboriginal tourism opportunities, especially basket weaving. The research used the *Travelers Voice* online research panel to identify and examine the target market for Aboriginal tourism in PEI[83]. The research found:

- Potential Aboriginal tourists were typical to all PEI tourists in that they were non-native, spoke English, worked full-time or were retired, had a university degree and earned under $100,000/year. The targeted Aboriginal tourist tended to be older and from outside of PEI (mostly Ontario and Quebec).
- The top five activities (of a list of 24) potential Aboriginal tourists were interested in were:
  - Hearing legends as told by Aboriginal people
  - Viewing Aboriginal artifacts
  - See the way Aboriginal people lived their lives
  - Trying traditional cuisine
  - Watching ceremonial dances

- ***New Brunswick***

In New Brunswick, similar to other provinces, data summaries indicate the proportion of tourists participating in Aboriginal tourism is relatively low.[84]

- In 2009/10, 7,000 Canadian residents attended Aboriginal cultural attractions and / or events while on trips that included visits of one or more nights in New Brunswick.
- The New Brunswick Department of Tourism, Heritage and Culture markets to Canadian, USA and overseas travelers using the Canadian Tourism Commission's Explorer Quotient travel market segmentation model. Between 13-21% of target Authentic Experiencers and Cultural Explorers seek Aboriginal attractions and events.

- ***Nova Scotia***

Studies on Nova Scotia tourism markets or strategies were not made available to this project; further, there was no information available on Aboriginal tourism in Nova Scotia.

9.7 North

Northern Canada is unique in a few aspects. First, as it spans from east to west with its northern borders being completely coastline; second, it is majority pristine land; and, third, and most important, has the highest percentage of Aboriginal indigenous population. Further, many Indigenous people are elected officials in the territorial governments, and a large number of government employees are Indigenous peoples.

While Aboriginal people are the majority population in the north, the north accounts for 4% of the Canadian Aboriginal population. The largest share of the northern population in two of the three territories is greater than

[83] Jadis, A. (2010). Aboriginal Tourism and Traditional Basket Weaving on Prince Edward Island: A Market Research Study. University of Prince Edward Island.

[84] Rioux, D. (2014). Custom data summary from the Travel Survey of Residents of Canada and the CTC's Explorer Quotient.

half the population in those areas – Nunavut (86.3%) and the Northwest Territories (51.9%) – while in Yukon, Aboriginal people account for 23.1% of the population.[85] The Aboriginal population of the Yukon includes First Nations and Métis, NWT's Aboriginal population is made up of Dene, (status and non-status Indians), Métis and Inuvialuit, while the Aboriginal population of Nunavut is primarily Inuit.

Exhibit 9-25: Northern Canada Aboriginal Population

Territories	Aboriginal identity population	Percent distribution*	Aboriginal identity population as a percentage of the total population
Canada	**1,400,685**	**100%**	**4.3%**
Yukon	7,705	0.6%	23.1%
Northwest Territories	21,160	1.5%	51.9%
Nunavut	27,360	2.0%	86.3%
TOTAL	**56,225**	**4.0%**	**53.1%**

**Percent distribution of Canadian population*

SOURCE: Stats Canada 2011, www12.statcan.gc.ca/nhs-enm/2011/as-sa/99-011-x/2011001/tbl/tbl02-eng.cfm

In northern Canada there are approximately 75 communities – 14 in Yukon, 33 in the Northwest Territories (which also has two Indian Reserves found in the southern region of the territory), and an estimated 28 hamlets/communities in Nunavut. Unlike other Canadian provinces where First Nations primary communities are Indian reserves, the north is mostly communities or hamlets and there are no segregations for the Aboriginal populations.

Of importance to Aboriginal tourism in the North are negotiated land claims agreements. These agreements provide recognition of First Nations/Dene, Inuit, and Inuvialuit people a form of government, legislating their authority to govern including protection of culture, language and heritage, and provide financial resources, lands and other resources. These settlements provide a means for Aboriginal people in the north to determine and direct their futures.

All three territories have numerous negotiated land claims.

Yukon First Nations land claim agreements were settled between 1993 and 2006. Of the 14 Yukon First Nations, 12 have negotiated Self Government Agreements.

9.7.1 Aboriginal Tourism Industry

Yukon is the only northern territory that has an independent Aboriginal tourism organization. The Yukon First Nations Culture and Tourism Association (YFNCT) grew out of the Yukon First Nations Tourism Association (YFNTA), which focused primarily on tourism; however, it did become inactive for about two years in the early 2000s. The YFNCT has an expanded mandate to its predecessor "*to foster the development of First Nations arts/culture and tourism sectors, recognizing the symbiotic relationships between the two sectors.*" (www.yfnct.ca)

[85] Stats Canada,2006 Census and 2011 National Household Survey

Yukon has eight tourism regions, and is promoted through the website www.travelyukon.com. Aboriginal images are easily identified in the home page scrolling banner, and immediately link the viewer to Aboriginal tourism (no clicks required). There are also Aboriginal tourism package recommendations. The most common term used is First Nation.

The Northwest Territories has established Aboriginal tourism as an integral part of its initiatives led by the Department of Industry, Tourism and Investment. The Government of the NWT (GNWT) has an Aboriginal Tourism Champions Advisory Council (ATCAC) that meets regularly and advises the Minister on the direction and development of Aboriginal tourism. Aboriginal tourism is distinctly expressed in the GNWT's five year tourism development plans. The recommendations of ATCAC also inform the marketing strategy and direction of Northwest Territories Tourism (NWTT).

NWTT is a non-profit organization that undertakes all destination marketing for the Northwest Territories on behalf of the GNWT, and it also serves as the tourism industry advocate in the NWT. NWTT's unique structure ensures a strong Aboriginal voice in its decision making and initiatives. Its board of directors is composed of seven elected director positions and seven appointed Aboriginal Government directors from across the Northwest Territories and includes an ex-officio representative from the GNWT. In 2014, three of the elected directors on NWT Tourism's board were Aboriginal tourism operators, giving Aboriginal entrepreneurs and communities a significant voice on NWTT's board. This unique approach in the Northwest Territories ensures a strong Aboriginal reflection in tourism development and training plans (GNWT Department of Industry, Tourism and Investment) and in the marketing of the Northwest Territories Tourism (NWTT).

Northwest Territories has five distinct regions and the Aboriginal culture of each region is incorporated into the marketing promotions of NWTT. Each unique region is reflected in NWTT's Spectacular NWT brand and Aboriginal images are immediately and easily identified on the home page of NWTT's website. With one click from the main page (www.spectacularnwt.com), a web visitor can explore authentic Aboriginal traditions, which are integral part of the packages featured by NWTT in its package page.

In Nunavut, Aboriginal tourism is incorporated into Nunavut Tourism operations. Nunavut's Aboriginal tourism initiatives are part of the territorial government tourism plans.

Nunavut has three tourism regions. The DMO, Nunavut Tourism, promotes each region on the DMO website (www.nunavuttourism.com). Aboriginal images cover the home landing page, with the tourism logo being an Inuit design. There is no exclusive Aboriginal tourism page, but recognizing that 86% of Nunavut's population are Inuit people, it is not needed as all tourism experiences can be considered as an Aboriginal tourism experience. Aboriginal tourism packages are also recommended activities.

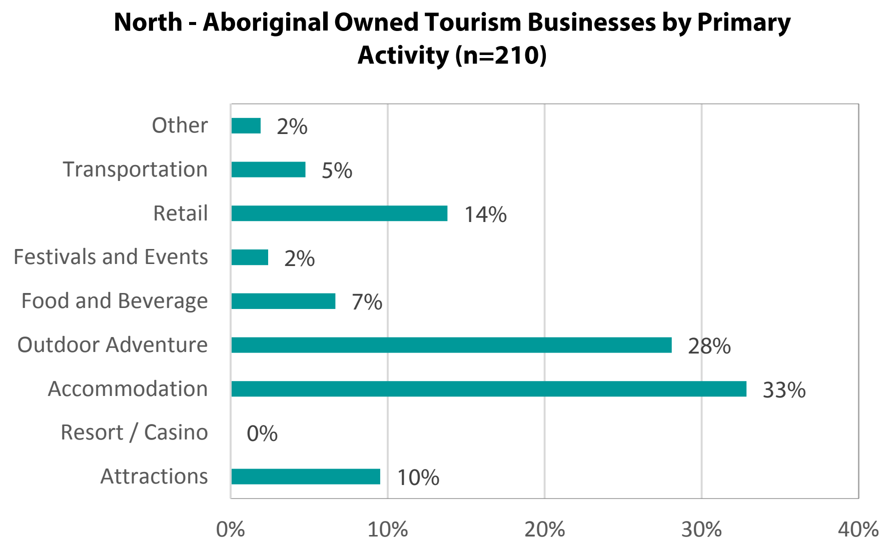
Exhibit 9-26: Northern Canada Aboriginal Tourism Businesses

SOURCE: ATAC National Aboriginal Tourism Research Aboriginal Tourism Operator Inventory 2014

Size and Value

In 2014, there were 210 Aboriginal tourism businesses in the three northern territories, representing 16% of all Aboriginal tourism businesses in Canada. While the percentage reported in 2001/2002 was 26%, that included many tourism business in the north that were not majority or minority Aboriginal owned (then it was considered that all Nunavut tourism experiences were considered as Aboriginal owned). In this study, Aboriginal ownership was applied in the development of the business list for Nunavut.

Exhibit 9-27: Northern Canada Aboriginal Tourism Businesses by Primary Activity



More than one third (34%) of business were accommodation, 28% were outdoor and adventure, and 14% were retail. Outdoor adventure businesses spotlight nature and land based adventures such as dog sledding, fishing and hunting, all compatible with the lifestyle of Indigenous people in the north. Accommodations in the north service two major industries – business and tourism. In Yukon, since treaty settlements in the late 1990s, many First Nations created cultural centers, which promote culture and language preservation, and connect with their own community economic and tourism strategies.

In the North, the cruise ship industry plays the largest role in Nunavut where coastal hamlets rely on cruise ships to bring visitors. The Yukon does not have its own port, but realizes tourists through Alaskan ports linked to Yukon through rail and ground (e.g., tour buses). NWT has one port, Ulukhaktok. (See ATAC study www.aboriginaltourismmarketingcircle.ca/cruise-ship-opportunities/ http://cruiseshipopportunities.ca/)

At the time of the release of this report, there was insufficient data to calculate the economic impacts (direct, indirect, and induced) for the Northwest Territories.

The Yukon and Nunavut Aboriginal tourism businesses generated the following total economic impacts (direct, indirect, induced).

Exhibit 9-28: Total Economic Impact Northern Canada Aboriginal Tourism, 2014

	Jobs (Full Time Equivalence)	Output	GDP (Value Added)	Wages and Salaries	Taxes	% of provincial businesses that are Aboriginal	# Aboriginal Owned Tourism Businesses	Total Aboriginal Tourism Employment
Yukon	180	$25,633,231	$13,304,973	$6,552,671	$1,045,119	4.7%	58	216
Northwest Territories	-	-	-	-	-	-	88	-
Nunavut	844	$223,069,526	$104,268,597	$62,814,138	$2,296,438	4.3%	64	781
TOTAL	**1,025**	**$248,702,757**	**$117,573,570**	**$69,366,810**	**$3,341,556**	**4.5%**	**210**	**997**

Secondary Research Summary

Yukon

As part of its visitor tracking program, Yukon conducted a visitor survey in 2012 for both the summer and winter seasons. In terms of Aboriginal tourism results, the study concluded that about 16% of summer travelers[86] (18% of winter travelers[87]) participated in activities that included First Nations culture; however, the summer incidence level was down from 24% in 2004.

In 2009, a study was done to better understand the demand for Aboriginal cultural tourism products and experiences among visitors to Yukon[88]. Key findings of the study included the following points.

- General interest in Aboriginal cultural tourism experiences in Yukon is high.
- Foreign travelers attach greater importance to Aboriginal culture than do North American travelers.
- Female travelers show greater interest in Aboriginal tourism experiences than do males.
- Aboriginal culture is not the primary draw for most tourists, but may be a factor in decisions to visit Yukon.
- Those who have participated in Aboriginal cultural experiences before are likely to do so again.
- Pre-trip information seeking is minimal, especially among North American travelers.
- Information seeking during trips relies heavily on local knowledge and word-of-mouth.
- Different travelers will pay very different prices for Aboriginal cultural experiences.
- Most travelers interested in Aboriginal culture are primarily looking for a learning-centered experience.
- There is interest in both contemporary and historical events and culture.

[86] DataPath Systems (2014). 2012/2013 Yukon Visitor Tracking Program: Summer Report. Government of Yukon's departments of Tourism and Culture and Economic Development, and the Government of Canada's Canadian Northern Economic Development Agency.

[87] DataPath Systems (2014). 2012/2013 Yukon Visitor Tracking Program: Winter Report. Government of Yukon's departments of Tourism and Culture and Economic Development, and the Government of Canada's Canadian Northern Economic Development Agency.

[88] Taiga Research & Consulting (2009). Demand for Aboriginal Cultural: Tourism in Yukon. Tourism Yukon.

- Aboriginal people are viewed as being closely connected with "nature" and possessing unique knowledge of the natural environment.
- Older travelers are often more interested in passive learning experiences, while younger travelers desire more active adventures.
- Independent travelers and those in organized groups seek different travel experiences and different benefits.

Northwest Territories

Aboriginal Tourism is a key priority for the Northwest Territories (NWT). *Tourism 2015*, the Government of Northwest Territories (GNWT) strategic tourism plan identified Aboriginal tourism as one of the six focus areas for priority (www.iti.gov.nt.ca/publications/tourism-2015-new-directions-spectacular-future). While this plan is sun setting, the new 2020 Tourism Plan draft continues to build on past work and has Aboriginal tourism as an embedded and supported priority throughout. This resulted in the formation of an Aboriginal Tourism Champions Advisory Council in 2011.

In 2013, ATCAC developed the *Recommendation for Strategic Action Plan for Aboriginal Tourism* to support the development and direction for Aboriginal tourism. This Strategic Action Plan identifies three focus areas.[89]

- People
  - Cultural and language enhancement
  - Human resources and skills development
- Communities
  - Community Aboriginal organization engagement
  - Infrastructure enhancement and development
- Business
  - Product development
  - Marketing and community development
  - Business and organizational development

Implementation of these recommendations is with the GNWT and overseen by ATCAC.

GNWT has been conducting an annual Road Visitor Survey since 2008 to understand and monitor road travel visitor trends, demographics, trip characteristics, spending patterns, and motivations. In 2013 survey results indicated:[90]

- More visitors participated in Aboriginal tourism in 2013 (64%) than any previous year (it was 14% in 2010[91]);

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[90] Malatest Program Evaluation and Market Research (2014). 2013 Trip Diary Phone Survey Findings. Government of Northwest Territories Ministry of Industry, Tourism and Investment.

[91] Aboriginal Tourism Champions Advisory Council (2013). Aboriginal Tourism: Recommendations for a Strategic Action Plan. Aboriginal Tourism Northwest Territories.

- The most common Aboriginal tourism activities in 2013 were visiting a cultural centre, museum, art gallery, or historic site;
- Aboriginal tourism activities were more available and easier to find in 2013; and
- Visitors were more likely to participate in Aboriginal tourism if they were from Canada, if they were going to Yellowknife or Inuvik, if they had completed higher levels of education, or if their main reason to travel was "general interest" or "always wanted to visit".

In addition, GNWT conducts a comprehensive Visitor Exit Survey every four years. The 2014/2015 survey includes questions to understand and monitor Aboriginal tourism participation rates, activities, reason for not participating, as well as, exposure to written or spoken Aboriginal languages. The NWT has nine official Aboriginal languages, of which language promotion is another priority for the territory.

Nunavut

Nunavut Tourism conducted a visitor exit survey in 2011 which was comparable to results in 2008 and 2006. In terms of activities, the study uncovered the following characteristics.[92]

- Since 2008 the total annual number of visitors to Nunavut has increased along with the majority of visitors to Nunavut visit for business purposes (64%).
- Similar to activity patterns in 2008, about one-third of visitors to Nunavut went shopping for local art, carvings, or other local products (32%). In 2011, 29% reported visiting a museum or cultural/visitor centre, 28% went hiking, 21% attended meetings, 19% visited friends or family, and 17% visited a park or heritage river. Altogether, 78% of visitors participated in cultural activities.
- It is safe to say that most tourism activities mentioned above include an Aboriginal tourism component.

In addition, the "*Tunngasaiji: A Tourism Strategy for Nunavummiut"* outlines a strategy for tourism development in Nunavut. In terms of Aboriginal cultural tourism, the strategy has four pillars.[93]

1) **Renewal** will set the governance structure for the industry.
2) **Partnerships** are critical to implement the strategy and achieve the vision and goals of Tunngasaiji.
3) **Attractions, products and services** will identify opportunities for development and growth, and provide the framework for increasing the quantity and quality of tourism market segment goods.
4) **Education and training** essential to developing the capacity of our tourism operators and communities that will advance the growth of the tourism sector.

A specific goal for leisure travelers (21% 0f all travelers) is to *Increase revenue generated through Inuit cultural tourism products and services as a fundamental element of the visitor experience in Nunavut*.

[92] Blue Heron Consulting (2012). Nunavut Visitor Exit Survey 2011. Nunavut Tourism.

[93] Nunavut Tourism (2013). Tunngasaiji: A Tourism Strategy for Nunavummiut. Nunavut Ministry of Economic Development and Transportation.

PART 5: SUMMARY OF FINDINGS

These section summarizes the information provided in each of the previous sections. Common findings are reported, and significant information to be considered.

10 Summary of Findings

There have been both advances and setbacks in Aboriginal tourism since the 2002 national study. Overall there are more Aboriginal tourism experiences, and greater relationships with government agencies, provincial and territorial tourism organizations, destination marketing organizations and the travel trade; however, the loss of regional Aboriginal tourism organizations has greatly negatively impaired Aboriginal tourism. Despite this loss, there can be no doubt that Aboriginal tourism has grown substantially in Canada during the time these two studies were undertaken (2002 and 2014).

- **The universe of the number of Aboriginal tourism businesses has expanded** from 892 in 2002 to more than 1,500 in 2014.
- **Direct employment of the Aboriginal tourism sector has increased.** In 2002, there was an estimated 12,566 people employed (including employment in casinos). Today it is estimated to be three times larger at an estimated 33,100.
- **Direct gross output from Aboriginal tourism businesses has increased.** The growth is an estimated $0.37 billion at $2.65 billion in 2014, up from $2.28 billion in 2002.
- **Direct GDP contribution from Aboriginal tourism sector has grown.** The current study estimated the GDP at $1. 4 billion, while it was estimated at $596 million in 2002. This difference may be attributed to the difference in the underlying industry distribution within the Aboriginal tourism sector between the two studies.

10.1 Aboriginal Tourism Success

Success in Aboriginal tourism businesses stems from operations, establishing and maintaining networks, respecting and sharing culture in an appropriate way, involving community and planning for the future.

While there are commonalities in Aboriginal tourism between provinces and territories, markets and opportunities in Aboriginal tourism varies by province and territory.

Ongoing support of Aboriginal tourism businesses has been partly due to regional focus on supporting Aboriginal tourism through regional economic development, planning and prioritizing.

10.2 Barriers

Overall, other than a few differences, commonly raised barriers /challenges of Aboriginal tourism growth were similar between Aboriginal tourism, government and other DMO professionals.

The following table summarizes barriers to Aboriginal tourism growth in Canada.

Exhibit 10-1: Aboriginal Tourism Barriers to Growth

Barriers to Growth	Aboriginal Tourism Professionals	Key Government Informants	DMO Professionals
Lack of Organization/Coordinated Approach			
Inconsistent definition across country	✓		
Unclear ATAC mandate	✓		✓
No strategy for growth	✓	✓	
Lack of support for new businesses or associations	✓	✓	✓
Lack of linkages with the tourism industry	✓	✓	✓
Overall Lack of Market/Export Readiness	✓	✓	✓
Availability of Qualified Workforce (e.g., training, business leaders)	✓		✓
Availability of Recent Research			
Lack of supply-side research w/out organization (e.g., business lists)	✓		✓
Availability of recent market research	✓		✓
Competition with Other Industries			
Workforce goes where they can earn the most money	✓	✓	✓
More government support for other industries	✓	✓	✓
Industry Infrastructure			
Expensive air transportation	✓		
Expensive insurance	✓		✓
Poor roads/signage to businesses	✓		✓
Community Support			
Unclear cultural protocols			✓
Lack of community infrastructure – roads, services, internet	✓	✓	
Community leaders focused on other priorities (e.g., housing, sewer, water)			✓
Lack of support for successful businesses and entrepreneurs	✓		✓
First Nations Language Support (not English or French)	✓		
Availability of Aboriginal Tourism Product in Major Urban Areas			✓
Access to Business Capital	✓	✓	✓
Key Visitor Market Perceptions of Injustice Against Aboriginal People (e.g., land claims, missing women)			✓

10.3 Opportunities

Common opportunities identified through interviews, surveys and secondary research were:

1) Product development is critical to securing greater travel trade interest and partnerships with Aboriginal tourism, and for building confidence within the Aboriginal community by visitors. This can

be done through training and development programs for the Aboriginal tourism operations and labour. Training suggested is – leadership and business skills, customer service, tourism industry knowledge, and cultural protocols.

2) Improve competitiveness through enhanced business development with mainstream tourism businesses/associations and network development with industry leaders.
3) Meet consumer demand through enhanced product development. There is consumer demand for Aboriginal tourism experiences that is authentic, unique and engaging, such as providing learning opportunities. These can be paired with wilderness, nature-based soft or hard adventures, food, arts and culture. They should exist in gateway communities to promote going 'Beyond the Gateway'.
4) Enhance livelihood for tourism businesses and local tourism economies through building support from local communities, and establishing strong industry associations.
5) Increase demand through marketing that raises awareness of Aboriginal tourism in Canada, and converts interest to visitation.
6) Work collaboratively on destination, business and product development with other Aboriginal tourism businesses and the tourism industry.
7) Identify ways to reduce the leakage of Canadian visitors seeking Aboriginal tourism experiences in other countries.

ATTACHMENTS

This section has background and supporting information pertinent to the development of the research report. It includes a list of the studies and reports collect, list of people interviewed, the Aboriginal tourism case studies, and the Aboriginal tourism operator and Travel Trade survey data.

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APPENDIX 1: People Interviewed

Aboriginal Tourism Association of Canada

Charlene Alexander, A/Executive Director, Yukon First Nations Culture & Tourism Association, Whitehorse, YK

Paula Amos, Marketing Specialist, Aboriginal Tourism Association of BC (AtBC), Vancouver, BC

Lori Beaver, Independent, Consultant in Alberta, Calgary, AB

Carole Bellefleur, Development Advisor, Tourisme Autochtone Québec, Wendake, QC

Cathie Bolstad, Executive Director, NWT Tourism, Yellowknife, NWT

Douglas Dillon, Development Officer, Government of the NWT, Yellowknife, NT

Teresa Dolittle (temp), Administrator, Six Nations Tourism (Six Nations Economic Development), Ohsweken, ON

Brenda Dragon, Liaison Consultant, Government of the Northwest Territories, Yellowknife, NT

Patricia Dunnet, General Manager, Metepenagiag Heritage Park, Red Bank, NB

Colleen Dupuis, Chief Executive Officer, Nunavut Tourism, Iqaluit, NU

Kevin Eshkawkogan, Chief Executive Officer, Great Spirit Circle Trail, M'Chigeeng, ON

Dave Leveau, General Manager, Tourisme Autochtone Québec, Wendake, QC

Trina Mather-Simard, General Manager, Aboriginal Experiences, Ottawa, ON

Robin McGinley, Executive Director, Cree Tourism, Ouje-Bougoumou, QC

Jeff Provost, General Manager, Eastside Aboriginal Sustainable Tourism Inc. / Aboriginal Adventures Manitoba, Winnipeg, MB

Linda Sarazin, Operations Manager, Aboriginal Experiences, Ottawa, ON

Charles Sark, Jr., Independent, Indian Arts and Crafts / Lennox Island First Nation, Lennox Island First Nation, PE

Kristy Sheppard, Director, Nunatsiavut Tourism - Labrador, Rigolet, NFL

Dana Soonias, Chief Executive Officer, Wanuskewin Heritage Park, Saskatoon, SK

Jeff Ward, General Manager, Membertou Heritage Park, Membertou, NS

Don Wilson, Industry Relations Marketing, Travel Alberta, Calgary, AB

Tourism Industry and Government

Alex Athanassakos, Research Manager, Ontario Ministry of Tourism, Culture and Arts, ON

Elisa Au, Western Diversification, Vancouver, BC

Bonnie Baird, Manager, Planning and Research, Tourism Saskatchewan, SK

Mariana Barbosa, Senior Policy Advisor, Tourism Branch, Industry Canada, Ottawa, ON

Olaf C. Jensen, Manager, Protected Areas Coordination, Environment Canada, Ottawa, ON

Jena Cameron, Senior Policy Advisor, Tourism Branch, Industry Canada, Ottawa, ON

Brad Cline, Director, Aboriginal Procurement and Business Promotion Directorate, Aboriginal Affairs and Northern Development Canada, Ottawa, ON

Nadine Crookes, Director, Office of the Chief Executive Officer (CEO) Aboriginal Affairs Secretariat, Parks Canada, Ucluelet, BC

Michel Dubreil, Research Manager, Canadian Tourism Commission, Canada

Carley Duckmanton, A/Aboriginal Engagement and Consultation Officer, Parks Canada, Ucluelet, BC

Kathryn Forgacs, Research Manager, Ontario Tourism Marketing Partnership, ON

Michelle Gagnon, Senior Program Manager, Aboriginal Affairs and Northern Development Canada, Ottawa, ON

Rick Gaunt, Senior Manager, Market Intelligence and Industry Relations, Travel Manitoba, MB

Peter Harrison, Director Tourism Partnerships, Destination British Columbia, BC

Peter Harrison, Director, Partnership Marketing, Destination BC, Victoria, BC

Bill Hodgins, Manager Tourism Business Development, Alberta Tourism, Parks and Recreation, AB

Erin Hodgins, Director, Research, Planning and Evaluation, Destination British Columbia, Victoria, BC

Kent Hudson, Manager Evaluation, Measurement and Business Intelligence, PEI Department of Tourism and Culture, PE

Constance Jamieson, Six Nations Tourism (Six Nations Economic Development), Ohsweken, ON

Cheryl Keats, Development Officer, Aboriginal Initiatives, Atlantic Canada Opportunities Agency, NL

Adama Konsiega, Director of Strategic Knowledge in Tourism, Quebec Ministry of Tourism, QC

Sandra LaFortune, DG, Policy Planning, CanNor, Ottawa, ON

Kim MacGregor, Research Analyst, Ontario Ministry of Tourism, Culture and Arts, ON

Sarah Marsh, Manager of Industry Services, Yukon Department of Tourism and Culture, YK

Travis McClellan, Senior Policy Analyst, Tourism Saskatchewan, SK

Colleen McCormick, Director, Strategic Issues, Ministry of Jobs, Skills Training and Tourism, BC

Laura McGowan, Tourism Development Officer, South, Alberta Tourism, Parks and Recreation, AB

Shannon McVenin, Product Development Officer, Tourism Yukon, YK

Anna Moran, Manager Tourism Research, Nova Scotia Tourism Agency, NS

Geneviève Morneau, Product Development, Quebec Ministry of Tourism, QC

Barry Parker, Aboriginal Affairs Northern Development Canada, Ottawa, ON

Yves Picard, Executive Director Office, Parks Canada, Québec, QC

Richard Porges, (A) Executive Director, Strategy, Research and Communications, Destination British Columbia, BC

David Rioux, Manager of Strategy, New Brunswick Department of Tourism, Culture and Heritage, NB

Michaela Roebothan, Director Tourism Research Division, Department of Tourism, Recreation and Culture, NL

Narvin Singh, Director, Partnership & Regional Relations, Ontario Tourism Marketing Partnership Corp., ON

Darryl Soshycki, Manager of Tourism Policy, Ontario Ministry of Tourism, Culture and Sport, ON

Frank Verschuren, Manager of Signature Experiences Program, Canadian Tourism Commission, Canada

Darryl Villeneuve, Consultant, Tourism Secretariate, Tourism, Culture, Heritage, Sport, and Consumer Protection, MB

Sandia Wu, Business Officer, Western Diversification, Vancouver, BC

Gord Zakreski, Industry Development, Tourism Saskatchewan, SK

Richard Zieba, Director, Tourism and Parks, Government of the NWT, Yellowknife, NT

APPENDIX 2: Case Studies

- **West** – Carcross Tagish First Nation, Yukon
- **North** – B Dene Adventures, Northwest Territories
- **Central** – Steeve Gros-Louis, Quebec
- **East / Atlantic** –Metepenagiag Heritage Park

CASE STUDY: Carcross / Tagish First Nation "Trails for Tourism"

"Together Today for Our Children Tomorrow". This 1973 document presented to Prime Minister Trudeau by Yukon First Nations guided the settlement of Yukon final and self-government agreements in the late 1990s, and provided the resources for *First Nation governments to make substantial headway towards improved socio-ec0onomic and cultural outcomes.*

For Carcross/Tagish First Nation (CTFN), the agreements presented an opportunity for "nation re-building" to fulfill their Economic Vision of:

The Economic Vision

Our vision is to build a private sector economy in Carcross that will create a sustainable flow of job and business opportunities for the community, our First Nation and the region.

CTFN plan to achieve their vision through applying the three *Key Elements to Success*:

- **Opportunity** – turning market circumstances into reality;
- **Resources** – leveraging money, equipment and land; and
- **The Team** – bringing together talented people all working towards complementary goals.

CTFN's approach was the creation of an arms-length development corporation called the Carcross Tagish Management Corporation (CTMC). Soon after a comprehensive community economic development plan that incorporated their resources – people, land, natural resources, culture, and heritage – while capitalizing on the opportunities available to them via market forces was developed. Community members were looking for industries that were environmentally friendly, which ruled out mining. Since mining was out, tourism became the imperative. To bring the economic vision to life, the community created a four pillar strategy:

- **Pillar One** – Grow a new niche market;
- **Pillar Two** – Service the new market;
- **Pillar Three** – Accommodate the new market; and
- **Pillar Four** – Create a year around market.

Development ideas included commercial, residential and tourism activities with a commercial village called Carcross Commons at the heart of the plans. Carcross Commons is driven by the idea of building its economy by using tourism as a cornerstone to their economic strategy.

Tourism is an important industry to Carcross and CTMC's economic strategy. More than 100,000 tourists pass through Carcross annually. This along with the pristine outdoors, governance authority, and other resources are features CTFN believes will attract investors and business to Carcross. However, for Tagish-Tlingit people, tourism offers other benefits. It provides a means by which to preserve and protect their culture, language and way of life, re-establish their history into Yukon's history, yet more important, to connect their youth to their culture, heritage and lands. CTFN leadership understood this when they proposed the development of mountain bike trails led by youth as a way to redirect youth to a healthy way of life as well as establishing a carving center to commission totem poles.

The bike trails became the pride of CTFN youth, and of the community and Yukon. **Montana Mountain Trails** was selected by *Outside Magazine* as the *2013 Global Mountain Bike Destination of the Year*, awarded **Tourism Yukon** *Innovator of the Year* award, was one of five **Tourism Industry Association of Canada** (TIAC) *National Tourism Attractions* finalists alongside attractions like Toronto's CN Tower, and won **Mountain Equipment Co-op** (MEC) contest for *East and West Canada Best: Dirt Search* by beating out Whistler, Vancouver, and Victoria.

Carcross, the Area and History

Carcross/Tagish First Nation is one of 11 self-governing First Nations in Yukon. The Final and Self-Government Agreements have constitutional protection, and is a form of government similar to provincial and territorial governments. Carcross/Tagish Government has the power to pass legislation in areas including education, health, social, land management, justice, cultural, and among other areas taxation. Today their education system includes Tagish/Tlingit cultural curriculum, and incorporates the Dah Kanhe (Tlingit national anthem), and offers full-time cultural activities in the carving center.

CTFN originates from two Nations – the Tagish and the coastal Tlingit – both of which are Indigenous Nations. Many Tagish-Tlingit still live a traditional lifestyle of fishing, hunting and trapping, which in the summer, involves leaving Carcross for a family fishing camp. The two nations are clan based, where all decisions are reviewed and approved by clan leaders. The inter-marrying between the Nations occurred over thousands of years and was facilitated by trade from the Alaskan coast inland into the Southern Lakes district surrounding Carcross.

Carcross and Tagish are the CTFN settlement communities. These towns have a total population of around 1000 people, 600 of which live between Carcross and Tagish. Carcross, where the government offices are located, is 63 kilometers southeast of Whitehorse (roughly 45-60 minute drive), and 180 kilometers northwest of Skagway, Alaska (approximately 90 minutes drive).

The area is of both cultural and historical significance to Yukon, first as the home of the Tagish and Inland Tlingit, and more prominently known as the heart of the 1896 Klondike Gold Rush[94]. Tagish First Nation members Skookum Jim Mason (Tagish name of Keish) along with nephew Dawson Charlie discovered the gold that launched the epic event. The two reported their find to Skookum Jim's business partner George Carmack, who was also Jim's sister Kate's husband. Carmack registered the claim on their behalf[95]. This initial discovery of gold attracted an estimated 100,000 prospectors hoping to strike it rich; however, only about 4,000 found gold in

[94] Also known as the Yukon Gold Rush, Alaska Gold Rush, Alaska-Yukon Gold Rush, and Canadian Gold Rush.

[95] First Nations could not legally register a claim in 1896, so George Carmack registered the claim on behalf of his First Nations family members.

what has also became known as the *Last Great Gold Rush*. Gold Rush history, along with other key visitor features of pristine wilderness (nearly 80 percent of untouched lands), is one of the draws of over 345,510[96] visitors in 2013 to Yukon; in this same year, Carcross attracted one-fifth (74,029) of these visitors.

While the town of Carmacks is named after George Carmack, in reality, Carcross (coined from the "Caribou Crossing"), is the heart of the Gold Rush; and consequently is a significant draw for visitors interested in Gold Rush history, as well as a motivator to others traveling inland from Alaska. Amongst the interesting entrepreneurs who got their start in the Carcross area during the gold rush was Fredrick Trump, the grandfather to Donald Trump, who owned and operated The Arctic restaurant and hotel.

The Alaska cruise ship industry is a key market for Carcross. Being at the end of Skagway, Alaska's rail inland, Carcross is the transfer point for train passengers who carryon to land/road tour packages, many of which are owned by cruise ship companies. This transfer affords Carcross a short period to capture the visitor's attention and dollars, often as little as 20 minutes, as they disembark trains to board charter buses or pickup rental cars.

Added to this time limitation to capture the visitor market is the duration of the tourism season. The typical Yukon tourism season lasts five months, beginning May and continuing to mid-September. These two factors increase the challenge to CTFN of identifying ways to attract visitors, and develop its economic base on tourism. Given these challenges, the community started to build single track mountain bike trails to attract new visitors that would stay in the region longer.

Creating a Tourism Vision

When CTFN achieved self-government, the first thing it did was prepare a full infrastructure and land management plan. Yet, in order for Carcross to capture a larger share of Yukon visitors and encourage them to extend their stay, CTFN had to develop a comprehensive plan consisting of practices, operating structure, systems, businesses and activities that would create the right environment to entice tourists to visit longer, satisfy the concerns and interests of Carcross citizens, and attract investors and partners. For the strategy to be successful, it was important CTFN have the buy-in of cruise ship companies, Carcross citizens, and strategies to achieve economic growth.

CTMC realized the strategy needed to be focused on establishing destination products. This effort started with building mountain bike trails, opening a carving center, Skookum Jim's museum, new visitor information center, and attracting many new entrepreneurs and partners to the town. Vital to this all was catering to the many existing tourists arriving from Skagway's cruise lines.

Cruise ship companies control rail travel and many tour packages offered. Whatever CTFN built had to meet their standards and fulfill needs identified by cruise ship companies, including any tour company partners, to encourage them to increase their customer's time in Carcross, and promote other activities. CTFN listened to the community and tour companies. Consequently, CTFN's business corporation, Carcross Tagish Management Corporation (CTMC), established partnerships with **Alaska Excursion**, and other specialty tour companies. These companies bring jeeps with mountain bikes to the community and shop in the Carcross Commons.

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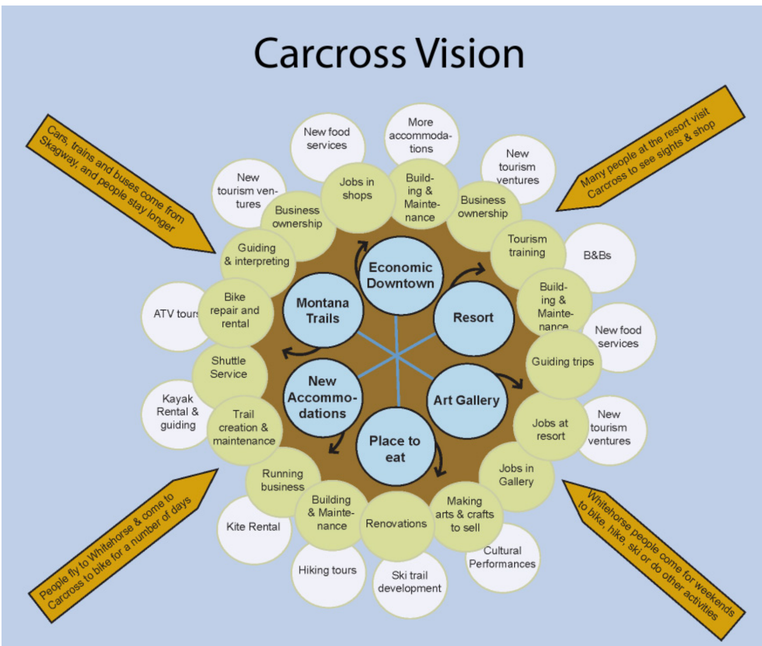
[96] http://www.tc.gov.yk.ca/publications/2013_Tourism_Indicators_Year_End_Report_2013.pdf

Carcross citizens support was needed to ensure the plans ultimately benefited Carcross citizens while protecting their lifestyle and promoting Tagish-Tlingit culture, values and beliefs. Above all, the plans had to enable the people to fulfill their cultural role as environmental stewards.

Community sessions were hosted to gather ideas and identify concerns, as well as map development and protected areas. The resulting strategy outlined a community vision that centered on building a strong economic core consisting of the downtown area, mountain bike trails, a resort, art gallery, and accommodations. It also identified spin-off business opportunities for Carcross and new residents.

Exhibit 10-2: Carcross Vision



Part of the CTFN decision-making process is a self-governing land management board consisting of six clan leaders. The board oversees all land decisions, and a group of six Elder's reviews the recommendations. While the Elders do not have veto power on the Board's decisions, their advice is regarded highly.

- ***Four Stage Development Approach***

The development has four stages.

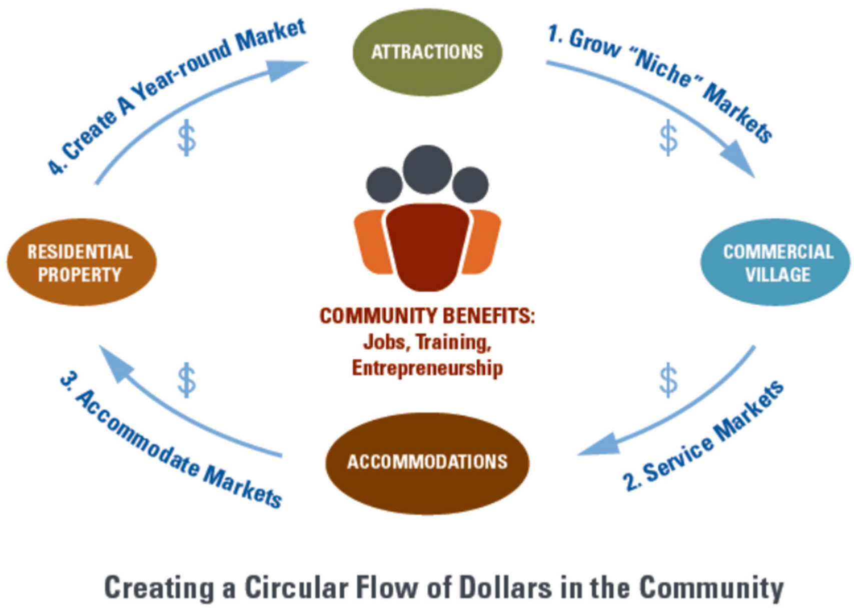
1) Target the niche markets "Hikers, Bikers and (wind) Boards"
2) Service the niche markets with Carcross Commons retail village
3) Pursue the accommodations market
4) Build a year round waterfront development

Montana Mountain Trails fulfills the first target "Hikers, Bikers and Boarders", while the establishment of **Carcross Commons** is the second. CTFN is currently working on securing an investor to contribute to the $65 million resort development, and the fourth stage of the year round development is planned with the full funds raised.

Development Pillars

The two pillars to this plan are Montana Mountain Trails and Carcross Commons Retail Village. All biking and village activities circle the production of Community Benefits (jobs, training, and entrepreneurship).

Exhibit 10-3: Carcross Tagish Circular Flow Planning



Essential to maintaining cultural and environmental principles of CTFN is the **Tourism Code of Conduct** guide. The guide was developed in 2004 and instructs visitors on how to respectfully enjoy their experience in Carcross on the trails, in the community and all traditional lands. The guide is "an essential tool for sound management of tourism development that balances our economic agenda with social development, cultural preservation and environmental protection." It is also the regulator that guides CTFN commercial operations and other's activities in their lands. It promotes the values of equality, learning and sharing, respect, integrity, quality service, sustainability and inclusivity, while operating within the four points:

CTFN Tourism Code of Conduct Intent

1) Respect the Culture
2) Protect the Environment
3) Enhance Community Benefits
4) Support Business Development

- ***Montana Mountain Trails***

Montana Mountain Trails (www.montanamountain.ca) was an initiative designed with two purposes: 1) to attract visitors; and, 2) to provide a way to involve youth. In 2006, with very little to do in the community outside their family, there was an increasing number of youth turning to at-risk behavior, such as alcohol, drugs and other activities. Community leaders wanted to reverse this trend by providing youth with something they could call their own.

Trails development was built by the **Singletrack to Success** (S2S) project with the support of Government of Yukon Sport and Recreation Branch and Community Development Fund, the Canadian Northern Economic Development Agency, and Tagish Lake Gold Corporation. Norco Bikes also partnered by donating ten bikes. The project started with 15 youth age 14+ working closely with community leaders. While carving trails, leaders taught youth: how to plan and build trails, identify plants, protect heritage sites, traditional place names, and how to give appreciation to nature. Leadership was key, especially having the Chief champion the program by addressing some community members' concerns that the trails would harm the mountain, wildlife and natural environment, and that Tagish-Tlingit people would be barred from continuing outdoor and cultural activities. Many Carcross citizens still spend summers at family fishing camps.

Concerns were addressed, and Montana Mountain Trails earned accolades of mountain biker enthusiasts worldwide. The trails attract 3,500 visitors per year to Carcross (many from Alaska), and has resulted in CTMC partnerships with niche tour companies – Mountain Bike Tour Company, Boreal Mountain Biking, and Cabin Fever Adventures – who have also located offices in Carcross. The trails are a point of pride for youth, who have taken ownership of the trails, and proudly report "I built those."

- ***Carcross Commons Retail Village***

Carcross Commons Retail Village is the community center housing offices, retail space, and tourist attractions and services including the Visitor Information Center, **Skookum Jim Museum**, and carving shed. Local businesses include arts and gift shops of which **Bears Paws** sells First Nation products, tour companies, and food establishments such as **Bistro on Bennett**, **Fisky Fish**, and **Scoop'um Jims** (an ice cream business which employs three youth).

The carving shed's master carver is the only full-time paid carver in the centre. He demonstrates carving, teaching courses for youth and Elders in the school and runs night classes. The 13th pole carved now stands in the downtown area near the Skookum Jim's House where public performances are given by story-tellers and dancers in full regalia. The House also serves as a youth drop-in center during winter months.

Summary

The Carcross/Tagish First Nation experience highlights key elements to preparing your community for tourism.

1) Define your development plans and principles in advance.
2) Know what your community strengths are – human resources, culture, knowledge, history, land and natural resources, and governance – and build upon them.
3) Develop a comprehensive community plan based on cultural principles, and know how each stage connects with the other.
4) A strong governance system can empower the community to ignite their economy – traditional decision making systems (e.g., Clan systems) can provide a strong foundation to planning.
5) Establish an arm's length development corporation with business mind board of directors while still working to achieve community support for each investment.
6) Develop a *Tourism Code Of Conduct* guide lays out how development will be done, and businesses and visitors are expected to behave. Prepare this with community involvement.
7) Connect and look for business and partnership opportunities with the tourism industry. Understand that tourism partners can provide access to markets that you may not otherwise be able to reach, or easily access.
8) Listen to your tourism industry partners for ideas.
9) Involve youth in the developments – have a project they can feel ownership of.
10) Support sharing of your culture by your cultural knowledge and skills keepers.
11) Strive for industry recognition and awards. These can bring awareness of your venture and instill community pride.

Contact:

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Website: www.investcarcross.ca and www.montanamountain.com

CASE STUDY: Steeve Gros-Louis "Leading Cultural Tourism – Linking Traditions with Modern Tourism"

Culture, traditions, ancestors and dreams – these qualities matched with values and ethics are what inspire Steeve Gros-Louis to live his dreams which started more than 25 years ago. Today he owns and operates seven businesses employing around 80 people in peak season, owns several buildings, is a Huron-Wendat traditional dancer, as well as is Administrator of Huron-Wendat Tourism Association and Chair of the Quebec Aboriginal Tourism.

Huron-Wendat Village

The Huron-Wendat Village has a population of 1,258 people (an additional 2,415 people live outside the village), and is located about 15 minutes from Old Quebec City.

Rich in Huron history and culture, the village offers visitors a wide array of tourism activities – visit the Huron-Wendat Museum and the Onh Onhoüa Chetek8e traditional Huron site, stay in longhouse accommodations at Ekionkiestha' or at the four-star Hôtel-Musée Premières Nations, experience traditional Wendake culture at a crafts workshop, relax at the ice bar or a spa, experience snowshoeing, snowmobiling, fishing, canoeing, and bicycling – all harmonized by myths and legends through storytelling, dancing, special events, and guided and self-guided tours. Nearby Kabir Kouba Falls offer outdoor enthusiasts year round natural beauty.

Culture, Tourism and Business

Cultural knowledge, values, practices, beliefs and ethics reverberate strongly in every aspect of Steeve's business, life and family – his wife *Niva* is a member of the wolf clan and very traditional, while he is bear clan and is business-oriented. As with his family, Steeve's paired business with cultural teachings.

Steeve's interest in self-employment was stirred by his grandfather who in 1939 linked culture with business by making and selling traditional Wendake snowshoes (and his father (Antoine Gros-Louis) in 1959 which employed 100 people in the village. Steeve's grandfather taught his children how to make traditional snowshoes along with business management skills, which in turn led Steeve's father to pass this knowledge to his children. In 2002, Steeve and his sister Mireille followed in their father's footsteps, and purchased the business from him.

This journey continued in 1984 when he joined the Sandokwa Dance Troupe (www.sandokwa.com) – the group is named after the eagle, Sandokwa, which is the messenger between the creator and humans. When he was young, Steeve was given the name Wadohandik, *"he who dances with celestial bodies"*, and learned the importance of working as a team, responsibility and leadership. The troupe performed in Quebec City and many international destinations. As a cultural dancer he learned to share the Wendate culture respectfully and exposed him to the tourism industry.

In 1989, he became troupe leader with the responsibilities of organizing training sessions and arranging international tours. For a while the group performed about 52 shows a year including 1 to 3 world tours each year, then when members began their own families the number of performances reduced to around 25 shows a year to targeted groups. In October 2014, one of these performances was to a Quebec cruise ship of Germans, which appears to be a promising market for the troupe and a good link for Aboriginal tourism.

The dance troupe today has 22 members, which includes the children of the original dancers, along with three of Niva and Steeve's children.

The Businesses

Steeve grew up in the snowshoe business. He started Le Restaurante Sagamité in 1999. Since then, he has expanded to own seven businesses and several buildings, lead a dance troupe, and Chair two Aboriginal tourism organizations. The businesses employs around 70 people year round, which increases to about 80 people in peak tourism season; many of the employees Wendake.

The business ventures are:

- **Gros-Louis Snowshoes, Arts & Crafts Boutique** is a family tradition which he co-owns and manages with his sister Mireille, where they ensure they adapt manufacturing methods and traditions to stay on top of the industry. The store sells a wide range of traditional snowshoes, arts and crafts made by community members, as well as jewels. About 85% of the 12 employees are Wendake. (www.raquettesgroslouis.com)
- **Atelier Onhara** is more than a workshop; it is an attraction and a place of cultural preservation. At the workshop, three Wendake people make handmade arts, crafts and gifts such as snowshoes, leather apparel (e.g., jackets), costumes, and jewelry, which are then sold at the Gros-Louis Snowshoe Boutique. As an attraction, visitors can watch the craftspeople make the items, and touch them; while as a cultural preservation center, the workshops teach community members how to make these items. Authenticity and quality are of high importance and are monitored closely in the workshop.
- **Le Restaurant Sagamité** is now one of the most famous restaurants in the entire Québec City region. Sagamité offers patrons the opportunity to see, touch, taste and experience Wendake-Huron culture. The restaurant is known for its flaming meat dish of fresh game meats chosen from a selection of buffalo, elk, and deer and, if you are lucky, caribou. Birthday people are honored with free dessert while dancers and waiters sign and drum a traditional Huron song. The unique characteristics of the restaurant are a key influencer, which in turn contributes to boosting Wendake-Huron Village tourism. He started in 2013 the restaurant was expanded to 200 seats in 2014; it now employs 50 people in peak season. (www.sagamite.com)
- **Reef Store** is Steeve's newest venture located in Wendake-Huron Village. The store has 50 aquariums displaying reef fish, fish that are not commonly found in stores in Quebec City region. This one-of-a-kind store lets Steeve combine his passion of deep sea diving with his daughter's love of the *Nemo* movie.

The business employees eight people (50% First Nation), of which his daughter has fun being the cashier once in a while (she is young).

The Markets

The primary tourist markets for the boutique and Wendake-Huron are Europeans, especially visitors from France and Belgium (countries where French is the primary language), along with Quebecers. Quebecers are also key winter and summer markets; consequently more and more efforts are spent targeting the Quebecers market. The secondary markets are Germany and USA visitors.

Involvement in Community and Tourism

Linking with tourism is a task Steeve knows is crucial to his businesses, as well as important to the things he wants to accomplish in cultural tourism.

He understands that the destination is as important to the visitor as the single experience. It's important to a destination to have a strong, vibrant tourism industry with a wide range of high quality market-ready experiences – this is called 'clustering'. When one visitor experience is strong, other tourism businesses benefit; converse conversely, when an area is weak, then all area businesses may suffer.

Steeve links and builds tourism as a leader in many aspects of tourism. He brings his ideas and experience to Administrator of Huron-Wendat Tourism Association (www.tourismewendake.ca) and Chair of the Quebec Aboriginal Tourism (www.quebecAboriginal.com).

In 2007, Wendake developed its tourism plan, which included performances in the Quebec 400th Anniversary. A few years later in 2012, Wendake invited Steeve to be a part of Wendake-Huron Tourism Association to help refocus it. He's also joined the Hôtel-Musée Premières Nations board of directors, and led the annual powwow committee.

Experience and Advice

Obstacles, problems and barriers are an expected aspect of running any business. It's how you address those challenges which determine your future. For Steeve, there were several obstacles over the years, lessons learned, and philosophies and ideas that helped him overcome them.

- **Financing an On-Reserve Business** – Fulfilling his long term dream of sharing Wendake culture through a restaurant began with a hurdle. The first attempt to open the restaurant was in 1997/98 when he tried to secure a location in Old Quebec city (15 minutes from Wendake). Troubled business negotiations led Steeve to look for a site in his home community of Wendake-Huron. Despite difficulties securing financing for an on-reserve investment, Le Restaurant Sagamité opened in 1999. The on-reserve location has been both a blessing and hindrance. On-reserve brings visitors to the community where the Wendate culture is alive and many cultural sites are available, and increases the employment opportunities for community people; however, it is also an impediment when seeking financing. The ability of a bank to protect their loan investment is hindered by the *Indian Act* which prohibits the use of on-reserve assets for loan guarantees. Even in 2013, the banks discouraged Steeve from going ahead with the $1.5 million expansion of Sagamité; consequently, he had to use all his resources to guarantee the loan. The expansion took 14 months.

- **Attracting Employees** – Along with challenges of identifying finances for on-reserve business, it has been difficult to find First Nations people to work in Sagamité. Of the 100 restaurant employees today, 25% are from Wendake, 10% from other First Nation communities, and 65% from Quebec; at the restaurant start, there were more Aboriginal people working in the business. The goal is to have more First Nations employees, especially youth employed. Experience is not necessary; they often start in entry level positions, like dishwashing, then are trained to move up to other positions such as waiter or cook.
- **Tourism Competition and Clustering** – There is a misconception that all tourism businesses compete; in reality, they support and complement each other. Tourists make their decision on the tourism business as well as the community and region. Tourism businesses need to understand they benefit from working together by giving the tourist more reasons to choose their area, and a great all-round tourism experience. Working together with tourism planning, training, marketing and promotions helps a region grow.
- **Right Location** – Choose a business or event location that makes it easier and attractive for your customers, and produces the greatest benefit for your business. Wendake Powwow discovered the best location was its annual powwow was in the downtown area where visitors to the powwow could also browse local stores.
- **Create Opportunity** – Find ways to create opportunities. Many opportunities are created by expanding your business and social contacts. Don't let these slip away. Always have a goal of promoting culture by looking for ways to include culture in activities. Wendate culture has been woven into the Quebec 400th Anniversary, and Robert Lepage, former director at the *Cirque du Soleil*, production of Shakespeare's "The Tempest".
- **Separate Business from Family** – Know when it's time for business and time for family. While cultural activities are often shared with family, business conversation needs to conclude at the end of the business day – remember to share time with your family, and ensure business does not take over family time.
- **Involve People** – Steeve's philosophy, "If you believe it you will succeed." He shares these ideas with others and encourages them to pursue their dreams, and as possible, inviting them to be involved.
- **Focus on the Customer Experience** – Always look for ways to give the customer a fantastic experience – it should not be about the money. It can be done in ways of adapting to the customer, and including new ways (such as done in making snowshoes (e.g., wood vs aluminum). Adapting must also be done strategically. Sagamité opened in 1999, but it wasn't until 2014 that the real renovations were done… that was when Steeve knew the business and markets and finances were stable and ready.

Summary

The lessons Steeve Gros-Louis learned from his father and grandfather, along with cultural lessons are established a solid foundation to Steeve's accomplishment as an entrepreneur, cultural performer, and tourism leader. He learned to be involved in all aspects of business staying involved in the management of every business and understanding how they connect to each other, culture, the community, region, and tourism industry. Steeve's life dream is to show that life is a circle. He wants youth and the next generations to know and show that their culture is rich. Tourism provides a way to maintain culture, and by sharing it with the world through tourism, it helps it survive, grow and increases its importance. Cultural tourism shows "We still exist, we did not go away, and we have the taste and passion to go further rand show to the world that we are alive."

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CASE STUDY: B Dene Adventures / Bobby Drygeese "Translating a Traditional Camp into Tourism"

Owning a business is not a job, it is living a dream. Everything Bobby Drygeese did from the time he started working in the tourism industry helped him realize he could earn a living doing what he loved… sharing his Dene culture.

The Business

Bobby Drygeese is the owner-operator of **B Dene Adventures**, an outdoor cultural adventure located in Dettah which is 27 km by road from Yellowknife, Northwest Territories (which is 6.5 km by ice road in the winter). Since 2009, he has been sharing the Dene culture with visitors at his bush camp on the outskirts of Dettah. The villages name means 'Burnt Point' in the Tli Cho language, which refers to a traditional fishing camp used by the Dene for hundreds of years.

Tourism is an important part of NWT's economy, with much of the tourism experiences being outdoor adventure – aurora viewing, fishing, and hunting – along with general tourism, visiting friends and relatives and business. In 2013/14, tourism contributed $132.5 million to NWT economy through 91,810 visitors, up at least 20% over the previous year.[97]

The site has been Bobby's family fishing and camping spot for several generations. With the advice and approval of his Grandma who also told him what he could share, such as the Shovel and Giant Beaver stories, and what must remain sacred. Visitors are entertained by demonstrations, participate in hand games and fishing, and are educated on the history of the territory including signing of Treaty 8 in 1899, prospector days, gold mines to present day.

Packages offered are:

- **The Dene and Our Land – A Dene Cultural Experience**– a 4- hour tour at the family fish/bush camp, Available year round, minimum 4 people, includes light refreshments, hotel pickup and drop off.
- **Dene Cultural Tours** – a 2-hour guided tour through three northern Dene communities – Yellowknife, Ndilo and Dettah – to learn of Dene people's relationship with the land, their history and culture. Winter tours travel the ice road to Dettah. Available year round, minimum 4 people, includes hotel pick up and drop off.
- **Winter Cultural Tours** – this 3-hour tour brings visitors through Yellowknife by ice road to Ndilo and Dettah and then by snowmobile to B Dene camp where they learn Dene history of the land, Wiliideah people in teepees, and see demonstrations of hand games, traditional drumming, and snowshoe to

[97] NWT Tourism statistics – http://www.iti.gov.nt.ca/infopage/visitor-spending-and-numbers

snare, and participate in traditional Dene games. Available winter season, includes hotel pickup and drop off.

- **Under Dene Skies – Aurora Viewing**– view and photograph northern lights, learn of Dene history, legends and stories, hear drumming, and sample traditional foods. Available late August to March, minimum 4 people, includes light refreshments, hotel pickup and drop off.
- **Boat Tour** – 2 to 4 hour boat tours along the traditional route through Yellowknife Bay, Wool Bay and the inside passage. Available late June to September, includes hotel pickup and drop off.

In low season from September to June, B Dene Adventures is also part of the local Aboriginal school program. At the fish/bush camp, kids learn from Bobby about Dene life, and how to play stick games, and catch and process fish.

Specialty camps are also available for all ages and are tailored to the group's interest. Activities are educational and / or focus on team building, and are interactive as day or overnight excursions. Camp topics can focus on: birds, berry/medicines, Aboriginal awareness, winter survival, moose/caribou hide tanning, trapping and snaring, traditional Dene games, canoeing, and fishing.

Starting Off

For many years Bobby Drygeese dreamt of operating his own cultural tourism business. In 2001, he started working in tourism with one of his friends. It was during this time that he and his friend kicked around the idea of starting a tourism business. Not long after, the friend landed a job with one of the mines; leaving Bobby partnerless. Bobby looked for another partner, but it was hard to attract a one when money was uncertain – tourism does not pay as well as the mines, and means working year round, which did not fit the life style of hunters and trappers who regularly work their own trap lines. In 2006, Bobby decided to go it alone and signed up for a business planning course.

While writing his business plan, Bobby learned there are no clear steps. There are tasks, and they do not often happen in the order courses and books tell you to do them – it is really a checklist of things to be done.

In business planning, Bobby says you have to be willing to change your plan and your approach. People you talk to about planning and funding will give you advice on how to operate, plan, build calendars, accept payment… good ideas on how to make things work. One potential funder rejected his loan application as Bobby had only one customer at the time—even though this customer was a big customer… the NWT Department of Education; so Bobby found another funder, one that believed in him and his idea, and wanted him to start.

Others helped connect Bobby with markets. The NWT Department of Industry, Tourism, and Investment (ITI) introduced Bobby to Yellowknife tourism leaders. Bobby invited one of the new big companies to his camp, showed them around, and subsequently, signed a business agreement.

The Government of NWT also provided financial support helping the business launch, with upgrading the family camp, and for other business activities.

Operating Your Business and Working with Your Community

After business funding is approved and you launch your business, the hard work is still to come. “It takes a lot of time. You have to market like crazy, got to find the money, keep track of what you spend and how you spend it,” says Bobby. Keeping track of funds is a daily job done by Bobby’s wife – she does all the bookkeeping. Bobby does all the writing of bids and quotes. The only full-time people are Bobby and his wife, while others are brought on when there are tours. Bobby looks for opportunities as much as possible to hire community members.

While visitors come from around the world, tourism is a small place – everyone knows each other. There are many competitors in the area, and Bobby has to find ways to keep his prices down to be competitive. All tour companies get the same rate and are treated the same. In NWT, most tourists are Japanese, Germans are a secondary market, and the Chinese market is emerging. Translators are needed to service these markets – the tour companies Bobby works with supply their own translators. This helps both the tour company and Bobby accommodate last minute bookings, and Bobby to keep the costs down. If Bobby had to supply translators, he would have to charge more.

Money is watched tightly and regularly. He sets money / profit aside to reinvest in the business – e.g., replace, maintain and buy equipment – and as a safety net for when business is slow (e.g., low season and industry and economic downturns), and for the unknown. In summer 2014, there was a big forest fire which shut down roads and severely affected the tourism industry. There were a lot of cancellations in the summer; which meant Bobby had to tighten spending and focus on building winter business. In addition, spoke with his family to find ways to cut costs, like family outings, and adapted the tour packages to accommodate and attract new groups.

Maintaining your network is critical to keep in the forefront of the minds of your customers and industry. Bobby keeps these connections alive by attending workshops, conferences, and attending events, and constantly marketing with advertisements and public relations (e.g., speaking at events, being in industry stories and publications). B Dene Adventures is featured in Trip Advisor, Lonely Planet, and Youtube.

When operating in a community, Bobby says it is critical you involve the community. When Bobby was planning the business, they held a community meeting– it was important at the beginning that the community be informed of Bobby’s ideas and that their concerns are addressed. Elders required visitors safety is of the utmost importance. Some community members did not like the idea of bringing tourists to Dettah; they were concerned there would be a large number of people wandering through the village, or going to the camp without a guide. They wanted restrictions on where tourists could go, and that tourists are guided at all times. Bobby showed how these concerns were addressed. Bobby is certified with Wilderness First Aid, Commercial Boat License, Class 4 Driver’s License, Bear safety training, and firearms license. He also keeps fire extinguishers, first aid kits, and bear spray and bangers in all facilities and vehicles, and requires helmets are to be worn on snowmobiles, life jackets on boats.

He further offered to assist others with starting a business – he has even done workshops in *Starting a Business* in other NWT communities.

Over time, community members have understood the business and what it has done for the community and the Dene culture; now they have become a part of B Dene Adventures by helping out and work at B Dene. Teenagers in the communities are involved – for 15-20 years Bobby has been coaching them on drumming and playing traditional games, and teaching them how to be on the land, showing them how to build walking bridges. As youth and other community members are involved – there is shared pride and felt ownership in B Dene Adventures.

Advice from Elders...

- Always be honest – Do not lie, always tell the truth
- Make sure everybody is safe
- Follow our traditional rules and laws – the Elders and parents tell of the traditional rules to balance with modern rules
- Always focus on balance – there will be times you will have to say 'no' to stay in balance

Summary

Bobby Drygeese's experience in starting and operating B Dene Adventures can help others planning to share their outdoor cultural experiences and knowledge through tourism.

1) When planning your business, involve the communities you will be visiting. Host a community meeting, talk with them about your idea – hear and address their concerns – get their support.
2) Know where it is acceptable to bring your visitors and where it is not – guided tours help ensure that community privacy is respected.
3) Look for ways to connect with the tourism industry. Attend meetings and workshops, tell them what you are doing, invite them to your business, and maintain your connections by regularly attending industry events.
4) Marketing has to happen all the time – make sure you have put money aside to market, keep track of how it is spent and determine if the activity was worthwhile.
5) Profit should be reinvested in the company and set aside for slow times.
6) Always have a plan for everything – be certain all concerns are covered.
7) Work with tour operators to keep your costs competitive –when translators are needed and provided by the tour company, then the cost should be lower than when you provide the translator.
8) Know where your business fits in the industry, who your competitors are, what your limitations and strengths are, and price accordingly.
9) Find ways to involve the community – look for opportunities to hire them.
10) Create a business that ensures your visitors are safe at all times.
11) Involve youth in your business – cultural adventure tourism is a way to teach youth how to be on the land, build, and cultural activities, values and lessons.

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CASE STUDY: Metepenagiag Mi'kmaq Nation "Metepenagiag Heritage Park Inc."

"The opening of our park is a time to honour and reflect on the traditional way of life of our ancestors more than 30 centuries ago. It is also a time to celebrate our pride as Mi'kmaq of Miramichi, and our inseparable connection to the land at Metepenagiag and the river that has sustained our enduring community. We have a long history here. Metepenagiag Heritage Park is a valuable cultural and educational facility that will help everyone see the bigger picture"… Chief Noah Augustine

Metepenagiag Heritage Park Background[98]

On August 22, 2007 the Metepenagiag Heritage Park Inc. was officially opened. The idea of the Metepenagiag Heritage Park began when in 2006 the Province of New Brunswick published "To Hold it in my Hand" which was part of a series *New Brunswick Manuscripts in Archaeology*. The manuscript was co-authored by Metepenagiag community members, was founded on community member historical and cultural knowledge, and included memories of Chief Joseph Michael Augustine. Augustine shared Elders stories of a 2500-year-old burial ground, which is known as Augustine Mound. During the excavation of this site from 1975 to 1977, the 3000 year-old Oxbow fishing village was uncovered along with 60 additional pre-contact sites, thus effectively confirming the Mi'kmaq of Metepenagiag (Red Bank) cultural history, leading to the Monuments Board of Canada designations of Augustine Mound National Historic Site in 1975, and Oxbow National Historic Site in 2002.

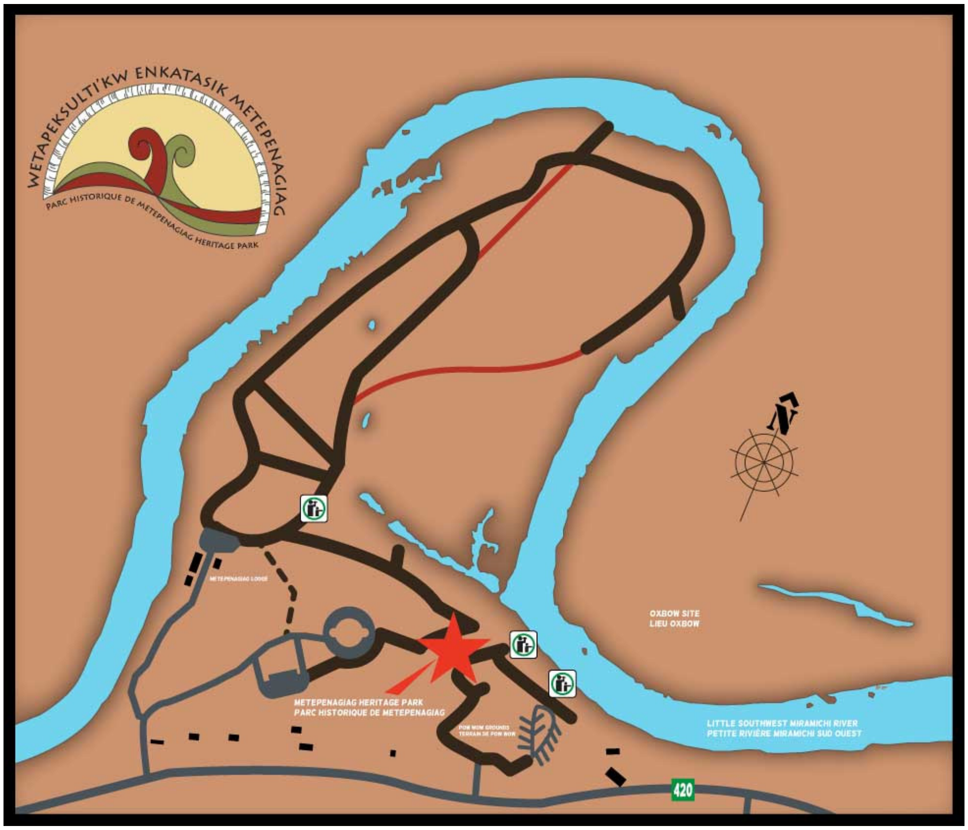
Metepenagiag Heritage Park is located in Metepenagiag Mi'kmaq Nation (Red Bank) at the crossroads of Little Southwest and Northwest Miramichi Rivers in northeastern New Brunswick.

The Park

Open from May to October, Metepenagiag Heritage Park provides visitors with experiences that reflect the contrasting nature of the historic and modern day experiences of Metepenagiag people. The park offers: interactive displays, artifact exhibits, a multimedia theatre where visitors can view the creation story film, special events (e.g., Annual Powwow, Annual Trout Derby, National Aboriginal Day, and St. Anne's Day), and walking trails (2.5 to 3 hour guided tours, or self-guided) developed and controlled by Metepenagiag. Also available are a gift boutique, and meeting and conference facilities.

[98] Augustine, Madeline, Turbull, Christopher, Allen, Patricia, Ward, Pamela

Exhibit 10-4: Metepenagiag Heritage Park Site Map



TRAILS

- Tupsi Outij – Alder Trail
- MusquiOutij – Birch Trail
- Keskomikeg – Hill Road
- Elmiosek – Upper Oxbow
- Wosweg Outij
- Gobit Outij – Beaver Trail
- Masos Outij – Fiddlehead Trail

The nearby Metepenagiag Outdoor Adventure Lodge (www.metepenagiaglodge.ca) provides a 30 seat conference center and accommodations to compliment the park's offerings.

The Park's primary objective is protecting and presenting the national significance of Augustine Mound and Oxbow National Historic sites of Canada as the home of the Mi'kmaq (two of the most outstanding Aboriginal heritage archaeological sites in Eastern Canada). The majority of visitors originate from within New Brunswick; at present there is an average of 2000 visitors a year: 10% of these were international visitors; 2% were from the USA; and 88% were from Canada.

The Park's mission is:

Mission Statement

"The mission of Metepenagiag Heritage Park is to preserve, protect and present the national significance of Augustine Mound and Oxbow nation historic sites of Canada and explore the Mi'kmaq heritage of Metepenagiag."

Community Benefits

The Park provides a place for the Mik'maq of the Metepenagiag culture to be preserved, protected and promoted, as well as a place of learning to both Mik'maq people and other visitors. It also provides a place of pride, and employment for up to 10 people in operations, including youth who may be working at their first job, and Elders to share their cultural knowledge.

The boutique affords approximately 10 community artisans and craftspeople a place to sell their arts.

Developing the Park

Development of the Park took over 30 years (because of the various challenges that were faced with its development including the funding issues; changes in provincial and federal leadership and hence support for the project; community issues; other challenges noted below) and several partners of the Metepenagiag, Provincial and Federal governments. An organization structure that comprised of a Project Management Team, Interpretation Advisory Committee, and Project Executive Director are accredited with the development's success.

The core **Project Management Team** comprised of representatives from Metepenagiag Heritage Park, Metepenagiag Mi'kmaq Nation, Parks Canada, INAC, Atlantic Canada Opportunities Agency (ACOA), Canadian Heritage, New Brunswick Regional Development Agency, and the New Brunswick Provincial archaeologist oversaw the project implementation. It met frequently to fulfill its responsibilities to review and approve progress payments, and provide overall ideas and direction to the park's development. The Park's **Executive Director** was responsible for managing the overall budget.

Who represented funding agencies was just as critical to the project's development as the organization's participation itself. "Having senior managers representing the funding agencies involved in the project from the very beginning was instrumental in ensuring that unexpected challenges related to potential cost overruns and other challenges, such as delayed construction schedules, could be overcome."

In addition to the Project Management Team, an **Interpretation Advisory Committee** was set up as part of the project development and implementation process, consisting of a committee of Elders. The IAC's overall objectives to:

- Provide advice and guidance to the Manager of Interpretation/Client Services and contractors during the design phases; and
- Ensure that the projects general program and facilities objectives were achieved.

The overall capital funding for the project in 2005 was estimated at $6.6 million, and provided by:

- Department of Indian Affairs – $2 million
- Atlantic Canada Opportunities Agency – $2 million
- Department of Canadian Heritage – $1.6 million
- Province of New Brunswick – $1 million

This project highlights the importance of partnerships. It was the opportunity for the Metepenagiag and its partners. Subsequently, the project team received Parks Canada's *CEO Award of Excellence* as recognition of the importance of partnership to the completion of the park.

Key Success Factors to Overcoming Challenges

There were a number of key success factors associated with the project that are noteworthy as part of this case study.

- Successfully launching the park can be attributed to the high quality of the people involved in the project. There was complete open mindedness by those involved that allowed each member to look beyond their mandate and role as dictated by their employer and to become a champion of the project. The Metepenagiag project became a project about the shared heritage of both Aboriginal and non-Aboriginal people. Once people bought into the idea, everyone became a champion of the project. The project became part of Canada's and New Brunswick's history so all those involved in the project became committed to telling "our" story with the Metepenagiag history the underlying foundation.
- Ongoing Metepenagiag leadership support ensured the continued development of the park throughout the 30 years it took to establish the park. Successive Chiefs supported the project with a number still involved in the project many years later.
- The project always had ongoing support from leadership. It did not become a political football and was regarded by successive leadership as a sacred project; one that needed their immediate and completed support and commitment.
- Community involvement throughout the project was an essential element. A committee of Elders guided the senior interpretation specialist to craft the various exhibits and messages the community wanted to share.
- The approach taken by Metepenagiag regarding the project contributed significantly to the project opening. The First Nation first and foremost approached the project from a position of wanting to build partnerships and relationships. Right off the top, government personnel were regarded and treated as partners in the project. This created excellent relations and as a result created government champions for the project.
- Having the right people involved in the project from the start helped the project when facing challenges. Dedicated people who could focus on solutions rather than dwell on the problems kept the project moving forward.
- There were excellent relations between the government people involved in the project and the Metepenagiag community. Issues that arose were dealt with quickly and in a professional manner.
- The longstanding relationships between the government people involved in the project and the community created a unique situation where the plight of the Metepenagiag became their cause as

well. They were respectful of the project, the Nation's staff and did everything they could to provide support to the project.

- Because the government personnel were so supportive of the project and supported the Nation in a wide variety of ways, they also assisted the First Nation to develop capacity in areas that they did not have capacity in. When there were obstacles, everyone worked together to work through the issues. Everyone took ownership in the project.
- There was always a respectful appreciation by the non-Nation members that the project must remain in control of the Metepenagiag community; driven by them; and controlled by them. They respected community ownership which was the foundation from which they conducted their work and participated in the project.
- The project had a long term vision that all involved were aware of. This vision included a vision for the future development of the site which was fully supported by the entire project team.

Challenges Faced

There were a number of challenges faced by the project over its 30 year development which included the following.

- The length of time that it took to develop the project from the mid 1970's to August 2007 was extensive. The community chose to view the delay as an opportunity for each partner to get to know each other and to develop trust to work together toward the common end.
- Original estimates for visitor numbers was were much higher than the current average of around 2000 annual visitors. A major challenge for the Park has been its lack of operating capital to undertake marketing programs including erecting signage to direct and attract tourists to the site. Metepenagiag knows it continues to be difficult for visitors to find the Park; many do not know the Park exists. The Park heavily relies on the internet, social media and its contacts in the industry to attract visitors.
- The project involved multiple partners at both provincial and federal levels. Everyone had to be onboard and at the same time to ensure the project activities could move forward smoothly. Just as the Nation thought it had everyone on side, there would be a federal or provincial election and new Ministers would come in and the Nation had to again develop that relationship. New governments did not simply honor what past governments had been doing; they had to be educated on the benefits of the project and its relation to the respective government.
- It was challenging to figure out each partner's mandates and community deliverables. Each department had its own policies and procedures requiring the Nation keep the project flexible to align with the changing environments of each department.
- Managing budgets and ensuring that the project was on schedule and budget was not easy. The Nation had to manage all aspects of this major capital project, tracking money arriving from multiple sources, and satisfying requirements from one department to the next.
- The operational shortfall of approximately $300,000 per year was a major stumbling block to moving ahead with construction because the funding agencies were hesitant to fund the construction of a building if there was insufficient revenue to run it after it was built. As a result, the project was delayed for a significant time until funding for operations was identified.
- Parks Canada originally had a policy that they could not contribute capital funding directly for construction because it did not have a cost-sharing program at the time that would allow them to fund

non-Parks Canada owned sites. This contributed to the project delay and created a dormant period for some time. This changed when Parks Canada's policies changed in mid-1980.

- During construction a major challenge was the way various government departments flowed funds. Some had a 10% holdback, while others could only reimbursed paid and approved expenses. What this meant was the project had to acquire working capital and bridge financing before contributions could be accessed.
- A number of the partners came to the table with preconceived ideas that were quickly dispelled. The hurdle was reporting requirements of each funding partner – each required information and updates which took considerable effort and internal resources to fulfill reporting demands.
- Chief and Council had many demands and particularly around ensuring the needs of the community were met. It was tough to keep Chief and Council updated on the projects progress to ensure their ongoing support and continued participation in the project.

Summary

The following provides a summary of the Metepenagiag Heritage Park operations.

1) Although the Nation was to contribute operating funds of $500,000 over a 10 year period to match Parks Canada 10 year commitment of $1.5 million, the Band faced a series of situations that did not allow them to contribute their portion of the operating funds. As a result, since opening its doors, the ongoing challenge for the facility is the cost of operations and the mitigation measures that need to be taken to reduce costs; hire part-time people; and have a part-time manager.
2) With operations held hostage because of lack of operating dollars, staff are seasonal and the manager cannot work on projects during the winter to prepare for summer operations because of lack of funding.
3) The most recent positive development for the facility is a new Board of Directors that is business savvy. The hope is that with the expertise brought to the table with the new Board of Directors there will be fresh ideas and network connections to access additional operational dollars.
4) Marketing is the biggest issue facing the facility. There was very little marketing dollars originally allocated, and now with the shortage in operating capital, there is little to no marketing spend. With no highway signs and directional signs, potential clients cannot find the facility let alone find out that it exists.
5) Staffing issues are similar to other First Nation communities with few that have the proper credentials to work at the facility. Many of the potential First Nation candidates are shy and are not ideal front line people for the tourism trade. There continues to be few First Nations staff working at the facility with not many programs in place to train and upgrade First Nations candidates.
6) The original goal of the project was to attract up to 25,000 guests per year, however with the challenges around marketing the facility, it brings in approximately 2000 people per operating season.
7) The challenge with Metepenagiag is that there are few cultural keepers that have the capacity to share their culture through drumming, singing and dance. As a result there is limited product available to market on site.

8) The biggest challenge facing Metepenagiag Heritage Site is senior staff burnout because of the situation of limited operational funding and the need for senior staff/managers to cover many positions during the tourism season.
9) On the positive, recent operational changes such as incorporating community events such as the powwow as part of the Heritage Site has increased the customer count through the facility.

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APPENDIX 3: Aboriginal Tourism Operators Survey

Aboriginal Tourism Operators Survey Questionnaire

National Aboriginal Tourism Operator Survey 2014

Introduction

Klahowya,
On behalf of the Aboriginal Tourism Association of Canada (ATAC), we invite you to help build Aboriginal tourism in Canada by participating in this survey of Aboriginal tourism businesses.

Your responses to the following questions will help ATAC gain a stronger understanding of the size, operating and marketing characteristics, management challenges and future prospects for Aboriginal tourism businesses in Canada. Your answers and those of other Aboriginal tourism operators will be used to guide ATAC in its future efforts to build greater awareness, support and programming for this increasingly important part of First Nation industry.

If there is question you prefer not to answer, please skip and continue the survey.

The information you provide will be kept strictly confidential, but will be reported as part of the collective responses used to guide ATAC future actions.

Please kindly complete the survey by Wed., November 19, 2014. It will take about 15 minutes to complete. Should you have any questions, please email oneil@designingnations.com.

Completed surveys are eligible for a prize draw certificate of $500 towards the purchase of any travel or accommodation booked through Aboriginal Travel Services, Canada's premier First Nations owned and operated full service travel agency. Certificate is valid for booking redemption prior to May 31, 2015 and has no cash residual value beyond the purchased services (inclusive of taxes and service charges).
http://www.AboriginalTravelServices.com
1-855-319-4552

The prize winner will be drawn December 1, 2014 from the contact info/emails in the survey. The winner will contacted by email or phone, and name posted on the Aboriginal Travel Association of Canada website.

I. THE TOURISM BUSINESS

1. Please provide your business name and contact

Contact Name:

Company:

City/Town:

State/Province:

Email Address:

Phone Number:

2. Indicate if you would like to be kept informed of Aboriginal Tourism Association of Canada activities, and of Aboriginal tourism activities in your province/territory. (Click all that apply)

- ☐ Yes, I'd like to be contacted by Aboriginal Tourism Association of Canada (ATAC)
- ☐ Yes, I'd like to be contacted by my provincial/territorial Aboriginal tourism contacts

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3. Where is its primary location?

- ◯ Alberta
- ◯ British Columbia
- ◯ Labrador
- ◯ Manitoba
- ◯ New Brunswick
- ◯ Newfoundland
- ◯ Northwest Territories
- ◯ Nova Scotia
- ◯ Nunavut
- ◯ Ontario
- ◯ Prince Edward Island
- ◯ Quebec
- ◯ Saskatchewan
- ◯ Yukon

4. Does the business... Click all that apply

- ☐ Sell goods, services, and/or experiences directly to tourists
- ☐ Sell services and/or experiences to travel agents, tour operators or other tourism businesses
- ☐ Host Aboriginal cultural events that tourists attend
- ☐ Supply good, services, and/or equipment primarily to Aboriginal tourism businesses (such as, entertainment, arts/crafts, gifts)
- ☐ None of the above

5. Is the primary business location on-reserve?

- ◯ Yes
- ◯ No

II. ABORIGINAL OWNERSHIP

6. Overall, what percentage of this business is Aboriginally owned?

- ◯ 0%
- ◯ 1% - 25%
- ◯ 26% - 50%
- ◯ 51% - 75%
- ◯ 76% - 99%
- ◯ 100%

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7. Who owns the Aboriginal portion of this business? (Click all that apply)

- ◯ Community owned (by 1 Band)
- ◯ Tribal council
- ◯ Band or tribal owned company/entity
- ◯ Multiple community owned (more than one Band or Tribal Council)
- ◯ Status Indian individual
- ◯ Inuit
- ◯ Metis
- ◯ Non-Status Indian/Aboriginal person
- ◯ Other

8. What is the legal structure of this business?

- ◯ Proprietorship/Private company
- ◯ Partnership
- ◯ Joint ventures
- ◯ Development corporation
- ◯ Corporation
- ◯ Not-For-Profit Corporation
- ◯ Registered Non-Profit Society (not including a Band or Tribal Council)
- ◯ Other (please specify)

III. TYPES OF TOURISM SERVICES

Which of the following business activities does the business provide? (Click all that apply)

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9. ACCOMMODATIONS

- ☐ Hotel or motel
- ☐ Resort or lodge (e.g. fishing lodge)
- ☐ Guest house/B & B
- ☐ Cabins and rental homes
- ☐ RV park or campground
- ☐ Aboriginal traditional housing (e.g. teepee, kikule)
- ☐ Other

10. ATTRACTIONS

- ☐ Cultural or interpretive centre/site
- ☐ Museum
- ☐ Art gallery
- ☐ Theatre
- ☐ Casino
- ☐ Nature based viewing areas and displays (e.g. fish hatchery)
- ☐ Other

11. EVENTS & CONFERENCES

- ☐ Pow-wow
- ☐ Cultural festival
- ☐ Feast
- ☐ Conference & trade shows
- ☐ Performances – traditional music or dancing
- ☐ Rodeos
- ☐ Traditional games/competitions (e.g. canoe races)
- ☐ Other Aboriginal themed events or conferences

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12. OUTDOOR & ADVENTURE

- [ ] Guided wildlife viewing/nature walks
- [ ] Guided fishing & hunting (Guide/Outfitter)
- [ ] Guided trail rides & horseback excursions
- [ ] Boat/Canoe/Kayak tours
- [ ] Golf course/driving range
- [ ] Other

13. FOOD & BEVERAGE

- [ ] Restaurant or café
- [ ] Fine dining establishment
- [ ] Fast food outlet
- [ ] Other food & beverage

14. TRANSPORTATION

- [ ] Airline
- [ ] Marina
- [ ] Water taxi
- [ ] Recreation vehicle
- [ ] Other kind of transportation

15. TOURISM SERVICES

- [ ] Guided tours
- [ ] Information Centre
- [ ] Retail – Gift Store/Craft Shop/Boutique
- [ ] Tour Operator/Tour Packager/Travel Agency – Leisure or Corporate
- [ ] Other tourism service

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16. Of the tourism activities offered, which tourism category generates the largest share of business revenue?

- ◯ Accommodations
- ◯ Attractions
- ◯ Events & Conferences
- ◯ Outdoor & Adventure
- ◯ Food & Beverage
- ◯ Transportation
- ◯ Tourism Services

Aboriginal Cultural Content

17. Does the business provide an Aboriginal cultural experience as part of the tourism products and services offered?

◯ Yes ◯ No

Aboriginal Cultural Tourism Activities

Which of the following Aboriginal cultural activities does the business offer to tourists?

18. TRADITIONAL EVENTS

Click all that apply, AND indicate if each element offered is presented by an Aboriginal person

	Yes, Offered	Click if presented by an Aboriginal person
Feasts	☐	☐
Pow-wow	☐	☐
Other	☐	☐

Other (please specify)

[ ]

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19. PERFORMANCES/DEMONSTRATIONS/INTERPRETATION

Click all that apply, AND indicate if each element offered is presented by an Aboriginal person

	Yes, Offered	Click if presented by an Aboriginal person
Dancers	☐	☐
Actors	☐	☐
Cultural lectures	☐	☐
Audio-visual presentations	☐	☐
Children's programs	☐	☐
Arts & crafts demonstrations	☐	☐
Story telling	☐	☐
Teaching circles	☐	☐
Other	☐	☐

Other (please specify)

20. INFORMATION/DISPLAYS/ INDOOR TOURS

Click all that apply, AND indicate if each element offered is presented by an Aboriginal person

	Yes, Offered	Click if presented by an Aboriginal person
Visitor orientation (pre-tour briefings)	☐	☐
Self-guided indoor tours – signs or handheld	☐	☐
Guided indoor tours – interaction with guide	☐	☐
Print materials on the local culture – language	☐	☐
Static displays/exhibits (with sound movement)	☐	☐
Static displays/exhibits (visual only)	☐	☐
Interactive displays/exhibits	☐	☐
Other	☐	☐

Other (please specify)

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21. MUSIC

Click all that apply, AND indicate if each element offered is presented by an Aboriginal person

	Yes, Offered	Click if presented by an Aboriginal person
Musicians – traditional & contemporary	☐	☐
Pre-recorded Aboriginal style-cultural music	☐	☐
Other	☐	☐

Other (please specify)

22. ABORIGINAL CULTURAL ATMOSPHERE

Click all that apply, AND indicate if each element offered is presented by an Aboriginal person

	Yes, Offered	Click if presented by an Aboriginal person
Aboriginal traditional apparel – on staff	☐	☐
Language – spoken or sung	☐	☐
Language – displayed on signs	☐	☐
Food – of cultural origin	☐	☐
Aboriginal décor/atmosphere	☐	☐
Other	☐	☐

Other (please specify)

23. NATURE-RELATED

Click all that apply, AND indicate if each element offered is presented by an Aboriginal person

	Yes, Offered	Click if presented by an Aboriginal person
Self-guided nature walks	☐	☐
Fishing/ hunting – doing/interactive	☐	☐
Guided nature walks	☐	☐
Other	☐	☐

Other (please specify)

National Aboriginal Tourism Operator Survey 2014

24. If Aboriginal cultural activities are offered, was there a process, person or group, that gave approval?

- ○ Yes
- ○ No
- ○ I don't know

IV. BUSINESS OPERATIONS & PERFORMANCE

25. In what year was this business started?

[ ]

26. In what months does the business usually operate? Click all that apply

- ☐ All months (open year round)
- ☐ January
- ☐ February
- ☐ March
- ☐ April
- ☐ May
- ☐ June
- ☐ July
- ☐ August
- ☐ September
- ☐ October
- ☐ November
- ☐ December

27. What are the peak revenue producing months for the business? Click all that apply.

- ☐ January
- ☐ February
- ☐ March
- ☐ April
- ☐ May
- ☐ June
- ☐ July
- ☐ August
- ☐ September
- ☐ October
- ☐ November
- ☐ December

28. Is the General Manager (or Director/Chief Executive) of this business an Aboriginal person?

- ○ Yes
- ○ No

29. How many employees work...
(Full-time is people who work more than 20 hours per week)

FULL-TIME - Year round/all months open? [ ]

FULL-TIME - Only during the peak season? [ ]

PART-TIME - Year round/all months open? [ ]

PART-TIME - Only during the peak season? [ ]

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30. Based on your answers to the previous question, how many employees are ABORIGINAL people that work...

FULL-TIME - Year round/all months open?

FULL-TIME - Only during the peak season?

PART-TIME - Year round/all months open?

PART-TIME - Only during the peak season?

31. How did the business perform in 2013?

- Made a Profit
- Broke even
- Had a loss

32. Over the past 3 years, how has the business sales/revenue performed?

- Increased
- Generally stayed level
- Decreased

33. In 2013, were the business sales/revenues generated from tourism...

- Below $500,000
- About $500,000
- Above $500,000
- I prefer not to answer this question

34. If below $500,000, what category best describes overall tourism revenues in 2013?

- Under $50,000
- $50,000 – $74,999
- $75,000 – $99,999
- $100,000 – $149,999
- $150,000 – $199,999
- $200,000 – $299,999
- $300,000 – $399,999
- $400,000 – $499,999
- I prefer not to answer this question

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35. If above $500,000, what category best describes overall tourism revenues in 2013?

- ◯ $500,000 – $749,999
- ◯ $750,000 – $999,999
- ◯ $1,000,000 – $1,999,999
- ◯ $2,000,000 – $2,999,999
- ◯ $3,000,000 – $3,999,999
- ◯ $4,000,000 – $4,999,999
- ◯ Over $5,000,000
- ◯ I prefer not to answer this question

36. How familiar are you with:

	Not at all familiar	Slightly familiar	Somewhat familiar	Moderately familiar	Extremely familiar
Role and mandate of Aboriginal Tourism Association of Canada (aka Aboriginal Tourism Marketing Circle)	◯	◯	◯	◯	◯
Aboriginal Cultural Experiences guidebook – National Guidelines	◯	◯	◯	◯	◯

37. Which (if any) of the following organizations does the business currently partner? Check all that apply.

- ☐ Travel Trade (e.g. tour operators, travel wholesalers, travel agents etc.)
- ☐ Local Aboriginal Tourism Association
- ☐ Provincial/Territorial Aboriginal Tourism Association
- ☐ Local Tourism Association
- ☐ Regional Tourism Association
- ☐ Provincial/Territorial Tourism Association
- ☐ Other Aboriginal Tourism Businesses
- ☐ Other Non-Aboriginal Tourism Businesses
- ☐ Local/Regional Visitor Information Centre
- ☐ Local/Regional Business Association (e.g. Chamber of Commerce)
- ☐ Other:

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38. Which of the following operation features are currently in place for this business? Check all that apply.

- [ ] Current business license
- [ ] Current provincial and federal tax registration
- [ ] Proven visitor safety track record (2+ years)
- [ ] Adequate liability insurance program (minimum of $2-$3 million liability)
- [ ] Capacity to accept group tours (e.g. washrooms/parking)
- [ ] Capacity to directly accept / book reservations within 24 hours
- [ ] Capacity to accept credit cards payments and/or debit
- [ ] Capacity to directly respond to visitor or travel trade inquiries within 24 hours
- [ ] Contingency plans for poor weather/emergencies
- [ ] Marketing plan with budget to work with international travel trade (e.g. tour operators, travel wholesalers, travel agents etc.)
- [ ] Program providing recognized industry discounts/commissions for travel trade partners generating revenues for the business
- [ ] Program providing product pricing information at least a year in advance of delivery
- [ ] Program providing confirmation and billing agreements with travel trade partners
- [ ] Marketing plan for group business
- [ ] Familiarization program for travel trade partners
- [ ] Travel trade show program for travel trade
- [ ] High speed Internet access
- [ ] Access to cellular service
- [ ] Photo image bank for distribution of travel trade partners
- [ ] Website offering product and service information (e.g. hours of operation)
- [ ] Front-line staff that speak language of target markets
- [ ] Transportation program with partners to bring visitors to tourism location(s)
- [ ] Program providing all equipment needed for participating in tourism activities
- [ ] Visitor satisfaction tracking/monitoring program
- [ ] Directional signage to help visitors find business location
- [ ] Training of front line staff in local Aboriginal culture
- [ ] General tourism and certification in tourism industry standards (e.g. customer service)
- [ ] Staff are equipped/trained for emergencies

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39. Which of the following marketing tools are currently used by the business? Check all that apply

- ☐ Printed Materials (e.g. brochures)
- ☐ Direct Mail
- ☐ Telemarketing
- ☐ Out of Home Advertising (e.g. Billboards)
- ☐ E-mail-newsletters
- ☐ Radio/TV/Newspaper advertising
- ☐ Media relations
- ☐ Online Search Engine Marketing (e.g. pay per click, search engine optimization, banner advertising)
- ☐ Online Social Media Marketing (e.g. Facebook, YouTube)
- ☐ Consumer shows
- ☐ Tradeshows
- ☐ Other (please specify)

40. Which of the following communication tools are currently used by the business? Click all that apply.

- ☐ Email
- ☐ Website domain name
- ☐ Website
- ☐ Facebook
- ☐ Twitter
- ☐ LinkedIn
- ☐ Instagram
- ☐ Pinterest
- ☐ Blog
- ☐ You Tube
- ☐ Other social media
- ☐ Toll-free telephone number
- ☐ Fax number/machine
- ☐ Voice mail/Answering machine

V. MARKETS

41. How much time does the business normally take to respond to travel information requests?

- ○ 5+ days
- ○ 3-4 days
- ○ 1-2 days
- ○ 9-24 hours
- ○ 4-8 hours
- ○ Within 3 hours
- ○ Other (please specify)

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42. Approximately how many tourists visited the business in 2013?

- ◯ Less than 500 tourists
- ◯ 501 – 1,000 tourists
- ◯ 1,001 – 5,000 tourists
- ◯ 5,001 – 10,000 tourists
- ◯ More than 10,001 tourists

43. What percentage of these tourists were from:
(responses must total 100)

% Your Province/Territory	
% The Rest of Canada	
% United States	
% Europe	
% Asia	
% Other Country	
Don't Know	

44. If some of these tourists were from EUROPE, what percentages were from:
(responses must total 100)

France	
Germany	
United Kingdom	
Italy	
Other Europe	
Don't Know	

45. If some of these tourists were from ASIA, what percentages were from:
(responses must total 100)

China	
Japan	
India	
Other Asia	
Don't know	

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46. Overall, on average how long do these tourists visit your operation? (select one)

- ◯ 0-2 hours
- ◯ 2-4 hours
- ◯ 4-6 hours
- ◯ 6-8 hours
- ◯ Overnight (1+ nights)
- ◯ Other (please specify)

47. On average, how many nights do customers stay?

48. What percentage of the clientele is generated by travel trade partnerships?

- ◯ 0%
- ◯ 1-25%
- ◯ 26-50%
- ◯ 51-75%
- ◯ 76-100%

IV. OPERATING CHALLENGES

How much do each of the following factors keep the business from reaching its full potential?

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49. BUSINESS OPERATION FACTORS

	Not at All	Somewhat	Quite A Lot
Obtaining adequate business liability insurance	◯	◯	◯
Obtaining a business license	◯	◯	◯
Responding to tourist inquiries in a timely manner	◯	◯	◯
Responding to travel trade inquiries in a timely manner	◯	◯	◯
Obtaining financing to start or expand the business	◯	◯	◯
Providing timely reservation and booking services	◯	◯	◯
Understanding how to work with potential travel trade partners	◯	◯	◯
Understanding how to prepare tourism business plans	◯	◯	◯
Understanding essential travel needs and preferences in key markets	◯	◯	◯
Partnering with other organizations in tourism markets	◯	◯	◯
Finding qualified staff	◯	◯	◯
Keeping staff	◯	◯	◯
Lack of training for staff and/or management	◯	◯	◯
Building the capacity of staff to deliver a top quality product/service	◯	◯	◯
Being able to take credit card payments	◯	◯	◯
Accessing advisory services for business operations and marketing	◯	◯	◯
Finding business development programs and services in the language of your choice	◯	◯	◯

50. DESTINATION DEVELOPMENT FACTORS

	Not at All	Somewhat	Quite A Lot
Good, year-round road transportation access to Aboriginal tourism areas	◯	◯	◯
Affordable air transportation to Aboriginal tourism areas	◯	◯	◯
Affordable boat, ferry or rail transportation to Aboriginal tourism areas	◯	◯	◯
Good supply of nearby accommodation	◯	◯	◯
Presence of a provincial/regional Aboriginal Tourism Association	◯	◯	◯
Good availability of cellular service	◯	◯	◯
Sufficient Internet technology infrastructure	◯	◯	◯
Availability of relevant market research	◯	◯	◯
Good road signage to the business	◯	◯	◯
Sufficient access to land and natural resources	◯	◯	◯

51. Are there any other factors preventing the business success?

VI. LOOKING FORWARD

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52. Over the next 3 years, how optimistic/pessimistic are you that your business will grow?

Very pessimistic	Somewhat pessimistic	Somewhat optimistic	Very optimistic
◯	◯	◯	◯

53. Over the next 3 years, to what extent do you feel your business will grow?

	Not at all	Increase somewhat	Increase a lot	N/A
More visitors during peak season	◯	◯	◯	◯
More visitors during non-peak season	◯	◯	◯	◯
More revenues	◯	◯	◯	◯
More staffing	◯	◯	◯	◯
More amenities and/or services	◯	◯	◯	◯
More cultural experiences	◯	◯	◯	◯
More infrastructure building improvements	◯	◯	◯	◯

Other

54. Does the business plan to invest more resources into tourism development? Check all that apply.

- ☐ Hire more staff
- ☐ Increase staff training
- ☐ Offer new amenities or services
- ☐ Offer new cultural experiences
- ☐ Expand infrastructure/building improvements
- ☐ Welcome new investment partners
- ☐ No changes planned
- ☐ Other

55. What other comments do you wish to share concerning how best to support the development and marketing of Aboriginal tourism in Canada?

Thank You

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Thank you for participating in this national Aboriginal tourism operator survey. Your comments are invaluable to strengthen Aboriginal tourism in Canada.

The study will be completed by April 1, 2015 - and will be available on http://aboriginaltourismmarketingcircle.ca/

More information on Aboriginal tourism in Canada is also available at this link, which also lists your provincial/territorial Aboriginal tourism representatives on ATAC.

Aboriginal Tourism Operators' Survey Responses

Table 1: Percentage Aboriginal Ownership of Surveyed Businesses

Percentage Aboriginal Ownership	% of Businesses	# of Businesses
0%	17.2%	17
1% - 25%	0.0%	0
26% - 50%	2.0%	2
51% - 75%	5.1%	5
76% - 99%	2.0%	2
100%	73.7%	73
		n=99

Table 2: Aboriginal Business Ownership Type

Ownership Type	Percent of Businesses
Community owned (by 1 Band)	24%
Tribal council	1%
Band or tribal owned company/entity	14%
Multiple community owned (more than one Band or Tribal Council)	2%
Status Indian Individual	29%
Inuit	4%
Métis	6%
Non-Status Indian/Aboriginal person	0%
Other	21%
	n=102

Table 3: Business Ownership Legal Structures

Business Legal Structure Types	% of Businesses	# of Businesses
Proprietorship/Private company	19.7%	23
Partnership	7.7%	9
Joint ventures	0.9%	1
Development corporation	5.1%	6
Corporation	17.9%	21
Not-For-Profit Corporation	19.7%	23
Registered Non-Profit Society (not including a Band or Tribal Council)	9.4%	11
Other (please specify)	19.7%	23
		n=117

Table 4: Aboriginal Business Primary Locations

Location	% of Businesses	# of Businesses
On reserve	48.8%	60
Off reserve	51.2%	63

Table 5: Aboriginal Tourism Services

Services	% of Businesses	# of Businesses
Guided tours	73%	70
Information Centre	30%	29
Retail – Gift Store/Craft Shop/Boutique	54%	52
Tour Operator/Tour Packager/Travel Agency	22%	21
Other tourism services	22%	21

Table 6: Events and Conferences

Types	% of Businesses	# of Businesses
Pow-wow	27%	20
Cultural festival	48%	35
Feast	26%	19
Conference & trade shows	23%	17
Performances – traditional music or dancing	44%	32
Rodeos	3%	2
Traditional games/competitions (e.g., canoe races)	27%	20
Other Aboriginal themed events or conferences	52%	38
	n=73	

Table 7: Outdoor and Adventure Services

Types	% of Businesses	# of Businesses
Guided wildlife viewing/nature walks	63%	40
Guided fishing & hunting (Guide/Outfitter)	22%	14
Guided trail rides & horseback excursions	13%	8
Boat/Canoe/Kayak tours	40%	25
Golf course/driving range	3%	2
Other	35%	22
	n=63	

Table 8: Attractions

Types	% of Businesses	# of Businesses
Cultural or interpretive centre/site	60%	54
Museum	26%	23
Art gallery	20%	18
Theatre	9%	8
Casino	1%	1
Nature based viewing areas and displays (e.g., fish hatchery)	31%	28
Other	32%	29
		n=90

Table 9: Aboriginal Cultural Experience Provided

	% of Businesses	# of Businesses
Yes	86%	101
No	14%	16
		n=117

Table 10: Cultural Programs

Performances/ Demonstrations/ Interpretation	% of all businesses	% offering Cultural Activity (of all that offered events)	% Aboriginal delivered
Dancers	35%	48%	93%
Actors	8%	11%	90%
Cultural lectures	44%	62%	84%
Audio-visual presentations	28%	39%	83%
Children's programs	30%	42%	84%
Arts & crafts demonstrations	52%	73%	83%
Story telling	48%	66%	88%
Teaching circles	25%	35%	87%
Other	10%	15%	100%
			n=89

Table 11: Cultural Atmosphere

Aboriginal Cultural Atmosphere	% of all businesses	% offering Cultural Activity (of all that offered events)	% Aboriginal delivered
Aboriginal traditional apparel – on staff	21%	30%	81%
Language – spoken or sung	44%	63%	94%
Language – displayed on signs	31%	44%	63%
Food – of cultural origin	49%	71%	79%
Aboriginal décor/atmosphere	48%	69%	73%
Other	5%	7%	67%
			n=86

Table 12: Aboriginal Music

Music	% of all businesses	% offering Cultural Activity (of all that offered events)	% Aboriginal delivered
Musicians – traditional & contemporary	40%	82%	96%
Pre-recorded Aboriginal style-cultural music	21%	43%	69%
Other	2%	3%	100%
			n=61

Table 13: Traditional Events

Traditional Events	% of all businesses	% offering Cultural Activity (of all that offered events)	% Aboriginal delivered
Feasts	30%	54%	81%
Pow-wow	17%	31%	86%
Other	31%	57%	92%
			n=68

Table 14: Tours and Information Displays

Information Displays	% of all businesses	% offering Cultural Activity (of all that offered events)	% Aboriginal delivered
Visitor orientation (pre-tour briefings)	40%	63%	78%
Self-guided indoor tours – signs or handheld	28%	44%	54%
Guided indoor tours – interaction with guide	33%	52%	80%
Print materials on the local culture – language	27%	42%	82%
Static displays/exhibits (with sound movement)	20%	32%	60%
Static displays/exhibits (visual only)	36%	57%	62%
Interactive displays/exhibits	19%	30%	46%
Other	6%	10%	50%
			n=79

Table 15: Nature-Related Activities

Nature-Related Activities	% of all businesses	% offering Cultural Activity (of all that offered events)	% Aboriginal delivered
Self-guided nature walks	24%	46%	33%
Fishing/ hunting – doing/interactive	14%	26%	82%
Guided nature walks	31%	58%	92%
Other	5%	9%	67%
			n=54

Table 16: Social Media Used

Communication Tools	% of Businesses	# of Businesses
Email	94%	102
Website domain name	61%	66
Website	74%	81
Facebook	74%	81
Twitter	32%	35
LinkedIn	25%	27
Instagram	11%	12
Pinterest	7%	8
Blog	13%	14
YouTube	28%	31
Other social media	8%	9
Toll-free telephone number	30%	33
Fax number/machine	61%	66
Voice mail/Answering machine	72%	78
	n=109	

Table 17: Response Time to Travel Trade Requests

Response Time	% of Businesses	# of Businesses
5+ days	1%	1
3-4 days	7%	7
1-2 days	34%	33
9-24 hours	19%	19
4-8 hours	10%	10
Within 3 hours	19%	19
Other (please specify)	9%	9
	n=98	

Table 18: Visitation in 2013

Number of Tourists	% of Businesses	# of Businesses
Less than 500 tourists	38%	38
501 – 1,000 tourists	17%	17
1,001 – 5,000 tourists	26%	26
5,001 – 10,000 tourists	7%	7
More than 10,001 tourists	13%	13
	n=101	

Table 19: % European Visitor Sources

European Country	% of Businesses	# of Businesses
France	45%	33
Germany	58%	42
United Kingdom	41%	30
Italy	19%	14
Other Europe	38%	28
Don't Know	47%	34
	n=73	

Table 20: % Asian Visitor Sources

Asian Country	% of Businesses	# of Businesses
China	33%	17
Japan	31%	16
India	13%	7
Other Asia	21%	11
Don't know	63%	33
	n=52	

Table 21: Length of Visit

Length of Visit	% of Businesses	# of Businesses
0-2 hours	36%	37
2-4 hours	18%	18
4-6 hours	10%	10
6-8 hours	6%	6
Overnight (1+ nights)	29%	30
Other (please specify)	1%	1
	n=102	

Table 22: % of Clientele Generated by Travel Trade

Clientele	% of Businesses	# of Businesses
0%	41.6%	67

1-25%	40.4%	65
26-50%	6.8%	11
51-75%	8.1%	13
76-100%	3.1%	5
		n=161

Table 23: Business Age Distribution

Age of Business	% of Businesses
1-2	9%
3-5	19%
6-10	16%
11-20	25%
21-30	14%
31+	18%
Average	17.2
	n=102
Note: Removed businesses that were > 100 years old	

Table 24: Months of Operation

Month	% of Businesses	# of Businesses
All months (open year round)	61%	70
January	9%	4
February	9%	4
March	18%	8
April	25%	11
May	64%	28
June	91%	40
July	98%	43
August	93%	41
September	80%	35
October	52%	23
November	9%	4
December	2%	1
		n=114

Table 25: Business Sales/Revenue Performance in 2013

2013 Performance	% of Businesses	# of Businesses
Made a Profit	39%	39
Broke even	34%	34
Had a loss	28%	28
		n=101

Table 26: Business Sales/Revenue Performance for Past 3 Years

Performance for Past 3 Years	% of Businesses	# of Businesses
Increased	52%	51
Generally stayed level	40%	40
Decreased	8%	8
		n=99

Table 27: Tourism Revenue Distribution (less than $500,000)

Tourism Revenues <$500,000	% of Businesses	# of Businesses
Under $50,000	40%	24
$50,000 – $74,999	13%	8
$75,000 – $99,999	7%	4
$100,000 – $149,999	3%	2
$150,000 – $199,999	7%	4
$200,000 – $299,999	5%	3
$300,000 – $399,999	7%	4
$400,000 – $499,999	2%	1
I prefer not to answer this question	17%	10
		n=60

Table 28: Tourism Revenue Distribution (greater than $500,000)

Tourism Revenues >$500,000	% of Businesses	# of Businesses
$500,000 – $749,999	20%	3
$750,000 – $999,999	20%	3
$1,000,000 – $1,999,999	13%	2
$2,000,000 – $2,999,999	0%	0
$3,000,000 – $3,999,999	0%	0
$4,000,000 – $4,999,999	0%	0
Over $5,000,000	13%	2
I prefer not to answer this question	33%	5
		n=15

Table 29: Future Tourism Investment Plans

Future plans for investment in tourism	% of Businesses	# of Businesses
Hire more staff	45%	46
Increase staff training	56%	58
Offer new amenities or services	55%	57
Offer new cultural experiences	71%	73
Expand infrastructure/building improvements	58%	60
Welcome new investment partners	37%	38
No changes planned	11%	11
Other	8%	8
		n=103

Table 30: Destination Development Factor Importance

Development Factors	Not at All	Somewhat	Quite A Lot	# of Businesses	% of Businesses
Good, year-round road transportation access to Aboriginal tourism areas	50	20	15	85	18%
Affordable air transportation to Aboriginal tourism areas	38	23	21	82	26%
Affordable boat, ferry or rail transportation to Aboriginal tourism areas	46	15	18	79	23%
Good supply of nearby accommodation	40	32	10	82	12%
Presence of a provincial/regional Aboriginal Tourism Association	37	29	14	80	18%
Good availability of cellular service	50	22	14	86	16%
Sufficient Internet technology infrastructure	50	21	13	84	15%
Availability of relevant market research	28	40	16	84	19%
Good road signage to the business	31	34	20	85	24%
Sufficient access to land and natural resources	48	21	15	84	18%
				n=94	

APPENDIX 4: Travel Trade Survey

Travel Trade Survey Questionnaire

ATAC Travel Trade Survey 2014

1. WELCOME

Klahowya,

For many years, I have been involved with Aboriginal tourism in our province/territory, and have had the pleasure of meeting many leaders in Aboriginal tourism in throughout Canada. The Aboriginal Tourism Association of Canada (ATAC) is conducting a national Aboriginal tourism study. The reasons for this project are:

- To understand the role Aboriginal tourism plays in Canada's tourism industry
- Identify ways to improve and strengthen Aboriginal tourism for the entire tourism industry

To do this, we need your help. This research project needs to do a survey of Travel Trade operators who are involved with tourism in Canada or Aboriginal tourism worldwide. The information in the survey will help develop an understanding of the opinions of Aboriginal tourism in Canada, and ways it can improve.

Your responses to the survey questions will be kept confidential, and only reported collectively in a summary.

Can you please give about 15 minutes to complete the survey online before Wednesday, November 19, 2014?

More information on ATAC is available at http://aboriginaltourismmarketingcircle.ca/ - questions can be sent to info@aboriginaltourismmarketingcircle.ca

Any questions, please email me or our researcher at oneil@designingnations.com

Completed surveys are eligible for a prize draw certificate of $500 towards the purchase of any travel or accommodation booked through Aboriginal Travel Services, Canada's premier First Nations owned and operated full service travel agency. Certificate is valid for booking redemption prior to May 31, 2015 and has no cash residual value beyond the purchased services (inclusive of taxes and service charges).
http://www.AboriginalTravelServices.com
Tel. 1-855-319-4552

The prize winner will be drawn December 1, 2014 from the contact info/emails in the survey. The winner will contacted by email or phone, and name posted on the Aboriginal Travel Association of Canada website.

With respect,
Keith Henry, AtBC CEO
ATAC Chair

2. About You

1. Contact Information

Name:

Company:

State/Province:

Country:

Email Address:

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ATAC Travel Trade Survey 2014

***2. What services does it provide? (click all that apply)**

- ☐ Wholesale
- ☐ Inbound
- ☐ Outbound
- ☐ Receptive
- ☐ Retail Travel Agency
- ☐ Incentive
- ☐ Don't Know/No Response (DKNR)

Other (please specify)

3. What Canadian provinces/territories are included in the company's travel itineraries? (Click all that apply)

- ☐ Alberta
- ☐ British Columbia
- ☐ Labrador
- ☐ Manitoba
- ☐ New Brunswick
- ☐ Newfoundland
- ☐ Northwest Territories
- ☐ Nova Scotia
- ☐ Nunavut
- ☐ Ontario
- ☐ Prince Edward Island
- ☐ Quebec
- ☐ Saskatchewan
- ☐ Yukon

3. ABORIGINAL TOURISM BUSINESS IN CANADA

4. Does the business offer Aboriginal cultural content in its tour packages

- ○ Yes
- ○ No
- ○ Don't Know/No Response

4.

5. How long has Aboriginal cultural content been offered in these packages?

- ○ Started in 2014
- ○ 1-3 years
- ○ 4-5 years
- ○ More than 5 years
- ○ Don't Know/No Response

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ATAC Travel Trade Survey 2014

6. If offered in CANADA, to what extent was the Aboriginal cultural content provided in these Canadian packages the primary focus, or part of part of a broader, multi-activity tour experience offered to clients?

- ◯ Primary focus activity
- ◯ Part of the broader, multi-activity tour
- ◯ Don't Know/No Response

7. In 2013, on average, how long were those Canadian tour packages that included Aboriginal cultural content?

Days

8. Of these packages, on average, how long was the Aboriginal portion?

Days

5. CANADA'S GLOBAL COMPETITION

9. Overall, how do Canada's Aboriginal cultural tourism products/services compare to these other tourism destinations?

	Much Worse	Somewhat Worse	About the Same	Somewhat Better	Much Better	N/A
Diversity of products available	◯	◯	◯	◯	◯	◯
Quantity of products available	◯	◯	◯	◯	◯	◯
Product authenticity	◯	◯	◯	◯	◯	◯
Customer service levels	◯	◯	◯	◯	◯	◯
Meeting visitor demand for the kinds of products/services	◯	◯	◯	◯	◯	◯
Meeting basic market/export ready standards	◯	◯	◯	◯	◯	◯
Quality of partnerships with travel trade	◯	◯	◯	◯	◯	◯
Consumer awareness of product/services	◯	◯	◯	◯	◯	◯
Branding of product/services	◯	◯	◯	◯	◯	◯
Price for value	◯	◯	◯	◯	◯	◯

ATAC Travel Trade Survey 2014

10. To what extent do you feel demand for the following aspects of Aboriginal tourism will change over the next 5 years?

	Decrease A Lot	Decrease Somewhat	Remain the Same	Increase Somewhat	Increase A Lot	N/A
Global Aboriginal cultural tourism	◯	◯	◯	◯	◯	◯
Canadian Aboriginal cultural tourism	◯	◯	◯	◯	◯	◯

11. From a travel trade perspective, what Aboriginal business practices are important to the competitiveness and growth of Aboriginal cultural tourism in Canada?

	Not at All Important	Slightly Important	Neutral	Moderately Important	Very Important	N/A
Encouraging new business development	◯	◯	◯	◯	◯	◯
Encouraging existing businesses to become market and export ready	◯	◯	◯	◯	◯	◯
Developing higher customer service standards	◯	◯	◯	◯	◯	◯
Ensuring authenticity standards are practiced	◯	◯	◯	◯	◯	◯
Improving destination infrastructure that supports Aboriginal businesses (e.g. roads, signage)	◯	◯	◯	◯	◯	◯
Improving community infrastructure	◯	◯	◯	◯	◯	◯
Developing relationships with the travel trade	◯	◯	◯	◯	◯	◯
Producing information that helps businesses understand key market traveler expectations	◯	◯	◯	◯	◯	◯
Providing better visitor pre-travel information	◯	◯	◯	◯	◯	◯
Building an attractive brand	◯	◯	◯	◯	◯	◯
Raising awareness of Canadian Aboriginal experiences in key markets	◯	◯	◯	◯	◯	◯
Ensuring products are priced appropriately more competitively	◯	◯	◯	◯	◯	◯
Practicing standard travel trade commission prices	◯	◯	◯	◯	◯	◯

Other (please specify)

6. MOVING FORWARD

12. Over the next five years, does the company intend to add more Aboriginally themed content to the set of tour experiences it provides in Canada?

Not at All	A Little	A Lot	N/A
◯	◯	◯	◯

7.

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ATAC Travel Trade Survey 2014

13. If A LITTLE or A LOT to the previous question, what kinds of cultural content (products/services) does the business plan to add?

- ☐ Accommodation-based products
- ☐ Attraction-based products (e.g. interpretive centre/site, museum, art gallery)
- ☐ Event-based products (e.g. pow-wow, performances, rodeos, traditional games)
- ☐ Outdoor and adventure-based products (e.g. guided fish and wildlife viewing, boat tours, trail rides)
- ☐ Food and beverage-based products
- ☐ Retail product
- ☐ Cultural interpretive products (e.g. tours, cultural tours or lectures, interpretive displays, informational signs)
- ☐ Don't Know/No Response

Other (please specify)

8. RECOMMENDATIONS

14. What are the top three actions Canada's Aboriginal tourism industry should take to increase its competeviness?

1.
2.
3.

15. What other comments do you wish to share concerning Aboriginal tourism development in Canada?

16. Please indicate if you'd like the Aboriginal Tourism Association of Canada (ATAC) to maintain contact with your organization

○ Yes ○ No ○ Don't Know/No Response

17. Would you be willing to participate in a telephone interview with the project research team to further discuss Aboriginal tourism in Canada as part of this research project?

○ Yes ○ No ○ Don't know/No Response

9. Thank You

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ATAC Travel Trade Survey 2014

Thank you for taking the time to participate in this survey.

Your responses will be kept confidential, and used to help the Aboriginal Tourism Association of Canada (ATAC) better support the development and delivery of quality Aboriginal cultural tourism experiences in Canada.

More information on ATAC is at: www.aboriginaltourismmarketingcircle.ca/

Travel Trade Survey Responses

Table 31: Travel Trade Business Services

Services Provided	% of Companies	# of Companies
Wholesale	32.4%	12
Inbound	54.1%	20
Outbound	16.2%	6
Receptive	64.9%	24
Retail Travel Agency	24.3%	9
Incentive	35.1%	13
Don't Know/No Response (DKNR)	8.1%	3
Other (please specify)		5
		n=37

Table 32: Provinces in Travel Trade Company Itineraries

Provinces Served	% of Companies	# of Companies
Alberta	77.8%	28
British Columbia	80.6%	29
Labrador	30.6%	11
Manitoba	36.1%	13
New Brunswick	58.3%	21
Newfoundland	52.8%	19
Northwest Territories	36.1%	13
Nova Scotia	58.3%	21
Nunavut	27.8%	10
Ontario	77.8%	28
Prince Edward Island	50.0%	18
Quebec	86.1%	31
Saskatchewan	27.8%	10
Yukon	47.2%	17
		n=36

Table 33: Years Aboriginal Content in Travel Trade Itineraries

Years	% of Companies	# of Companies
Started in 2014	2.9%	1
1-3 years	20.0%	7
4-5 years	11.4%	4
More than 5 years	57.1%	20
Don't Know/No Response	8.6%	3
		n=35

Table 34: Competitiveness Factors Shaping Canadian Aboriginal Tourism Growth

Competitiveness Factors	*Rating Average	# of Companies
Encouraging new business development	4.28	32
Encouraging existing businesses to become market and export ready	4.61	33
Developing higher customer service standards	4.36	33
Ensuring authenticity standards are practiced	4.55	33
Improving destination infrastructure that supports Aboriginal businesses (e.g., roads, signage)	4.15	33
Improving community infrastructure	4.27	33
Developing relationships with the travel trade	4.64	33
Producing information that helps businesses understand key market traveler expectations	4.42	33
Providing better visitor pre-travel information	4.15	33
Building an attractive brand	4.18	33
Raising awareness of Canadian Aboriginal experiences in key markets	4.48	33
Ensuring products are priced appropriately more competitively	4.27	33
Practicing standard travel trade commission prices	4.42	33
Other (please specify)		2
	n=33	
*Scale ranging from 1=not at all important to 5=very important		

Table 35: 'Top of mind' practices for improving Canadian Aboriginal tourism

First Mentioned Practices

- Cree Culture with the Language use
- Getting more market-ready Aboriginal business/products
- To become market and export ready
- Increase customer awareness
- Create international demand
- Link Canada's natural beauty with Aboriginal culture
- Video content to be viewed internationally
- Create awareness
- Competitive pricing and commission rate for RTO
- Authenticity
- Good relation with tourism industry
- Formation
- Design a strong brand
- Services level
- Encouraging existing businesses to become market and export ready
- Trips shows past and present of living

- Convert your interest in working with Travel Trade by encouraging the service providers to pick up the phone and respond to emails
- Improve service to price ratio
- Professionalism
- Awareness
- Trade price
- Make sure product delivered is the same as the product sold
- Educate non-Aboriginal Canadian about the existing sites, the products. Make them become your ambassadors.
- Travel Trade Ready

Second Mentioned Practices

- Survival skills on the Land
- Putting the authenticity on the first plan!
- Practicing higher customer service standards
- Develop more product for high yield consumers
- Integrate attractions and programs into tour operator programs
- Editorials in travel publications internationally
- Become professional
- Availability even for FIT clients
- Proud of their culture
- Education on members of level of standard quality for a good tourism experience
- Knowledge of our expectations
- Set quality standards that will apply to the offers
- Hotel structure level
- Encouraging new business development
- Wilderness Trips shows how to live there
- Help explain the importance of building and maintaining service schedules. If Travel Trade doesn't trust the service season/schedule it's hard to endorse and market.
- Communicate information about of the beaten path interesting locations/attractions etc.
- Travel industry rates
- Product readiness - polished
- Education
- Provide detailed information and rates
- Depending on the locations, offer better affordable accessibility
- Authenticity

Third Mentioned Practices

- The connection to the land by a Cree perspective (Cree values)
- Creating full hand on experiences with accommodations, soft adventures, meals and great native guide
- Respecting authenticity standards
- Both of the above!
- Partner with sightseeing operators to get transportation from urban gateways
- Flexibility
- Competitive prices for their original products
- Work on sustainable aspect
- Promotion
- Promote with partner, let them know what is available
- Reliability
- Developing relationships with the travel trade
- Aboriginal art with try it out
- Work with service providers to price their services so that a net rate or commission is a possibility
- Timely and precise responses to information requests by tour operators
- Ease of booking
- More accessibility
- Constant level of service

Table 36: Other "Top Of Mind' perspectives on Canadian Aboriginal tourism strategy

- International markets are continuously looking for local style experience that will enhance their travel in Canada. Keeping in mind that their main reason to visit our country is to discover our great open spaces, our nature!
- AtBC and other such marketing bodies are critical, otherwise single, individual operators have a much bigger mountain to climb.
- Canada does very well on showing our phenomenal landscapes and scenery to international visitors -- this is a key driver for international visitors to come to Canada. Unfortunately, Canada falls short on culture -- European and Asian visitors especially think our history is short and our cultural offerings uninspiring. Aboriginal tourism experiences that combine our best of Canada's natural beauty while highlighting the traditions and culture of our First Peoples should be winners for international visitors. Distribution of and transportation to these experiences are key too.
- More exposure as First Nations (different proud Nations), along the touristic areas where our international visitors pass by (ex: Brantford, Midland, Maniwaki, Quebec City, Trois Rivieres, Lac St-Jean, Montreal areas).
- Look at WAITOC in Australia, they are on the right way. A strong brand, quality standards and promotion with partners so that consumers will know that Aboriginal tourism does exist. Products must be bookable through Inbound Operators/Receptives and must be "internationally ready", pay

commission, guarantee dates and price etc. Make sure the product is UNIQUE in its way and that people will have a benefit of some kind when booking this.

- There tends to be a distinctive gap between the great relationship I have with the AtBC and the end service providers who are reluctant to respond to emails or phone calls and tend not to be able to offer net rates. We all have great intentions, and there are wonderful services available, but communication stops abruptly when trying to get an understanding together with the service providers.
- BC is far more advanced than Alberta in terms of market-ready products, ease of booking, and product awareness.
- I love to present this products in all the tours that I organize to my clients but the cost is something to high and increase the value of the product over 10 to 20 per cent more for the long distance to travel and the accessibility.