

WELCOME TO
Alberta Development Day



2017 INTERNATIONAL
ABORIGINAL
TOURISM CONFERENCE



ABORIGINAL
TOURISM ASSOCIATION OF CANADA

ASSOCIATION TOURISTIQUE
AUTOCHTONE
DU CANADA

THE PATH FORWARD

Keith Henry, President & CEO
Aboriginal Tourism Association of Canada

Indigenous Leadership



- 🍁 Industry focused and Industry led
- 🍁 Represent Indigenous-owned businesses
- 🍁 13 Board Members – from each prov./terr.

Strategic Pillars

- 1) Development
- 2) Marketing
- 3) Leadership
- 4) Partnership

A person in traditional Indigenous attire, including a fur-lined hood, is shown holding a kangaroo. The image is overlaid with a semi-transparent orange filter.

To provide leadership in the development and marketing of authentic Aboriginal tourism experiences through innovative partnerships.

MISSION

A group of people in traditional Indigenous attire, including a fur-lined hood, is shown. The image is overlaid with a semi-transparent orange filter.

VISION

A thriving Aboriginal tourism economy sharing authentic, memorable and enriching experiences.

Targets

Measurable goals to achieve by 2021



1) Aboriginal tourism revenues:

🍁 \$300 million increase in annual Canadian GDP by 2021

2) Aboriginal tourism jobs:

🍁 40,233 total workers by 2021





3) Aboriginal tourism businesses:

🍁 50 additional export-ready experiences by 2021

The Opportunity

Economic Impact

The 2015 National Aboriginal Tourism Research Project measured economic impact of Aboriginal tourism in Canada:

-  33,100 workers employed;
-  \$2.65 billion of gross output;
-  \$1.4 billion GDP;
-  \$870 million in wages and salaries.


The Opportunity

Existing Demand - Canada

Destination Canada – Research Department:

 In 2016, Canada welcomed 19,979,334 travellers

 the highest number since 2002

 second highest ever

 11% growth including 16% growth from overseas

 Most significant overseas growth was from:

 South Korea – 30% increase, 244,442 arrivals

 China – 24% increase, 610,139 arrivals

 Australia – 16% increase, 333,437 arrivals

 India – 13% increase, 215,664 arrivals

The Opportunity

International Demand

Destination Canada – Global Tourism Watch determined:

- ❁ Importance of Aboriginal tourism differs by market;
- ❁ Importance is highest in France, China, India, Germany, South Korea and Mexico;
- ❁ Aboriginal Tourism is a key differentiating factor for Destination Canada to capitalize upon

As a result of this:

Canadian Council of Tourism Ministers' (CCTM) in November, 2016, agreed to a declaration committing to collaboration on important issues including **“Grow Canada's tourism offerings by exploring opportunities to collaborate on Indigenous tourism”**.

The Opportunity

International Demand

Destination Canada Indigenous tourism research shows that international travel markets are most interested in:

 Enriching, engaged, immersive experiences with Indigenous people;

 Experiences that are related to nature and learning;

 Authenticity;

 Seeking benefits of 'discoveries' and 'adventures';

 Connection to nature and Indigenous way of life in context of spirituality and culture traditions;

NOTE: Entertainment oriented experiences and those that distance the traveler from Indigenous people are of lesser value and interest



INDUSTRY SECTORS

INDIGENOUS TOURISM



The Opportunity

Economic Impact

Alberta Tourism Industry:



127,000 workers employed (more than oil & gas)



\$8.3 billion contribution to the provincial economy in 2014



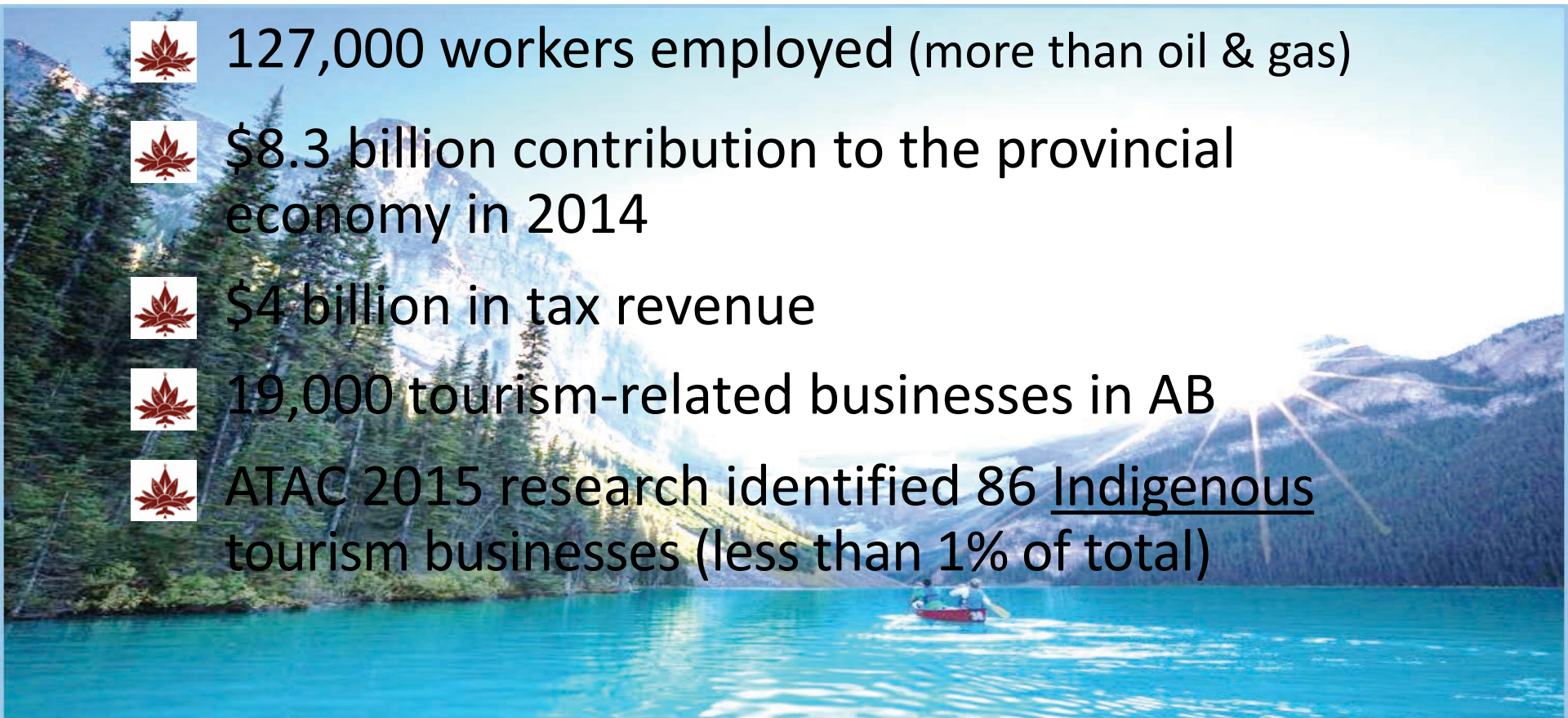
\$4 billion in tax revenue



19,000 tourism-related businesses in AB



ATAC 2015 research identified 86 Indigenous tourism businesses (less than 1% of total)



The Opportunity

Existing Demand - Alberta

Alberta Culture & Tourism has determined:

- ❁ 34.1 million total visits to Alberta in 2015
 - ❁ 85% of visits were by Albertans
 - ❁ 9.9% by residents of other parts of Canada
 - ❁ 5.4% came from the U.S. & and overseas
- ❁ Overseas visitor = \$1,128/visit
- ❁ Alberta visitor = \$162/visit

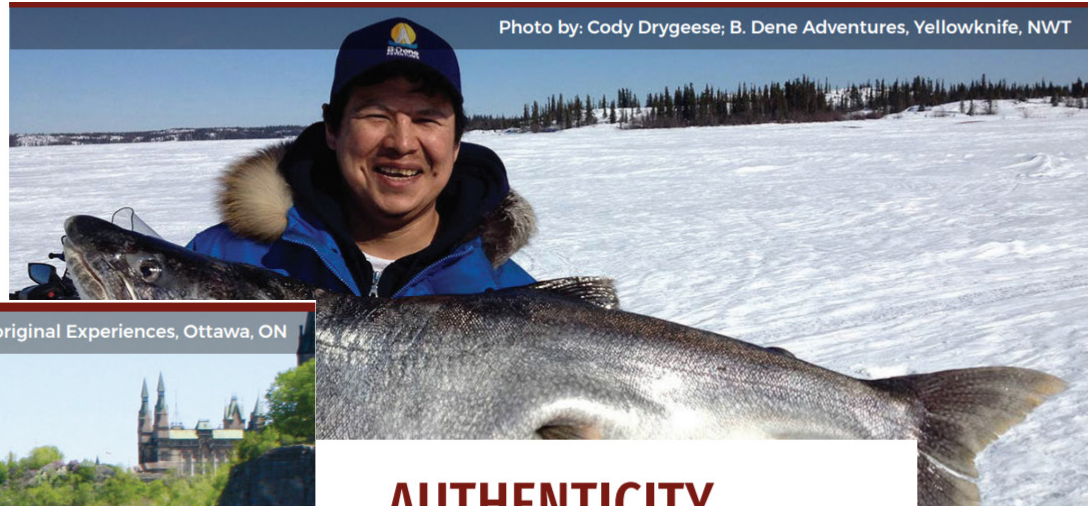


Source: Summary of 2015 Visitor Numbers and Expenditures August 2017

The Opportunity

Type of Demand

Visitors from the US looking for an Indigenous tourism experience:



**INTEREST IS THERE,
BUT AWARENESS IS LOW**

**AUTHENTICITY
IS KEY**

Source: 2017 USA Market Research Perceptions & Recommendations – ATAC & Destination Canada

The Opportunity

Type of Demand

Explorer Quotient (EQ) Target Audience for Indigenous Tourism

Destination Canada developed EQ Profiles to help focus product development, marketing and sales efforts on their “best” customers.

The best EQ targets for Indigenous tourism are:

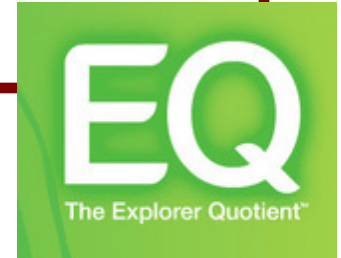
- 🍁 Cultural Explorers
- 🍁 Authentic Experiencers



Source: EQ Profiles – Canadian Tourism Commission, 2012

The Opportunity

Type of Demand



Cultural Explorers – characteristics:

- 🍁 The Importance of Spontaneity
- 🍁 Cultural Sampling
- 🍁 Adaptable to Change
- 🍁 Pursuit of New Things
- 🍁 Personal Escape
- 🍁 Personal Challenge

Favourite Activities:

- 🍁 Wildlife Viewing
- 🍁 Dining with local ingredients
- 🍁 Visiting parks, natural wonders
- 🍁 Visiting small towns & villages
- 🍁 Visiting historic sites
- 🍁 Interacting with locals

The Opportunity

Proven Path to Success

Success in Aboriginal tourism businesses stems from success in 5 areas:

- 1. Operations;**
- 2. Partnerships;**
- 3. Sharing culture appropriately;**
- 4. Involving community;**
- 5. Planning for the future.**

The Opportunity

Unique Set of Benefits

- ❁ Enhances livelihood for Aboriginal tourism businesses;
- ❁ Provides an opportunity to develop businesses that showcase a community's traditions and culture;
- ❁ It enhances cultural awareness delivering understanding and connection;
- ❁ Supplies the inspiration for elders to pass down culture, history and tradition to cultural ambassadors for sharing;
- ❁ It revitalizes Aboriginal traditions for the benefit of communities as well as travelers.

ABORIGINAL
CANADA



AUTOCHTONE
CANADA



The Challenge

Barriers to Growth

2015 National Aboriginal Tourism Research Project determined:

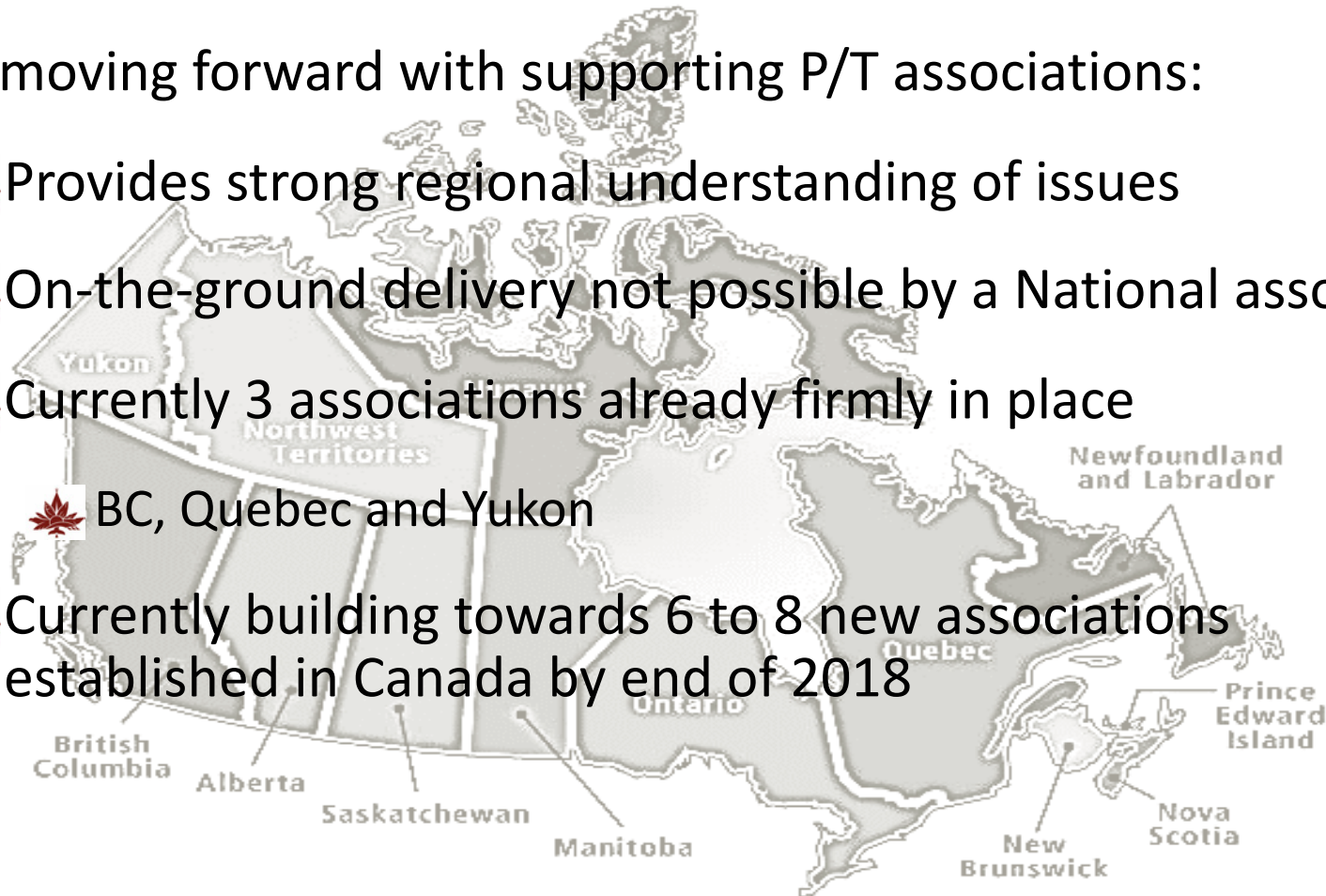
- ❁ Lack of organization & coordinated Aboriginal tourism approaches;
- ❁ Lack of market-readiness & Aboriginal cultural tourism product;
- ❁ Deficiency of a qualified workforce;
- ❁ Infrastructure challenges;
- ❁ Lack of community support is prominent;
- ❁ Limited access to business capital and support.

The Response

Prov./ Terr. Associations

ATAC moving forward with supporting P/T associations:

- ❁ Provides strong regional understanding of issues
- ❁ On-the-ground delivery not possible by a National assoc.
- ❁ Currently 3 associations already firmly in place
 - ❁ BC, Quebec and Yukon
- ❁ Currently building towards 6 to 8 new associations established in Canada by end of 2018



Alberta Activities & Progress

The Path Forward – to an association

Steps forward towards creating an Indigenous tourism association:

- ❁ Regional Industry engagement sessions
- ❁ Identify champions and create advisory/ working group
- ❁ Collect research, from both supply and demand-side
- ❁ Investigate funding support and partners
- ❁ Advisory group builds strategic plan based on research
- ❁ Establish formal association with leadership formed from advisory group and champions
- ❁ Association delivers strategy and establishes sustainability

The Path Forward – to an association

Steps taken in Alberta towards creating an Indigenous tourism association:

- ✿ Established a support partnership with Alberta Culture & Tourism to help fund activities
- ✿ Hired a regional coordinator to help grow relationships, activate the partnership and communicate programs



Lori Beaver
Alberta Coordinator

BACKGROUND – ATAC & ACT

\$100,000 grant from Alberta Culture & Tourism

- Overall Goals
 - 1) Help establish a provincial Indigenous tourism organization
 - 2) Grow tourism-related Indigenous businesses across the province.
- First time ATAC received grant funding from a prov./terr. government.

TACTIC 1: Regional Forums

8 Forums completed from May 15 to June 2

- 135+ participants
- Presentations from ATAC, ACT, Travel AB, local DMO and an ACC



Hinton, AB

Enoch, AB



Lac la Biche, AB



Blackfoot Crossing AB

TACTIC 2: Alberta Development Day

Nov. 6 – IATC Pre-Conference Workshop Day

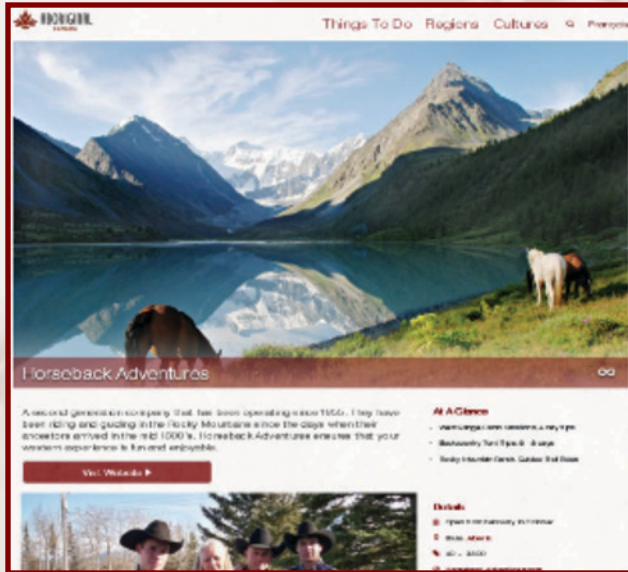
- By invitation only, up to 200 participants
- INAC has also committed \$160,000 to this program
- Goal of 100 Indigenous participants from Alberta
- Topics:
 - i. Product development for communities and entrepreneurs
 - ii. Partnering for tourism growth
 - iii. Artisan development
 - iv. Marketing and experience development



Indigenous and
Northern Affairs Canada

Affaires autochtones
et du Nord Canada

How To Learn More



AboriginalCanada.ca

- Listings of over 60 market-ready Aboriginal tourism experiences across Canada



AboriginalCanada.ca/corporate

- Corporate documents including full Aboriginal Tourism research report
- National Market-Readiness Guide
- Newsletter Sign-up

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