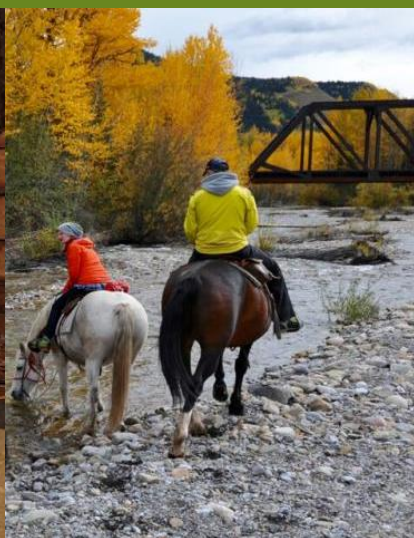




# Indigenous Tourism Alberta Strategy 2019-2023

Strengthening Alberta's Indigenous Tourism Industry



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# Message from the ITA Chair and Executive Director

Dear Tourism Colleagues,

We are proud to present the inaugural Indigenous Tourism Strategy for Alberta.

Indigenous tourism generates \$130 million of spending in Alberta, providing jobs and supporting entrepreneurs, businesses and communities.

The Indigenous Tourism Alberta Strategy 2019-2023 is an opportunity to grow Indigenous tourism spending by \$35 million (25% growth). It will allow industry, partners and governments to come together to grow and strengthen Alberta's Indigenous tourism industry. As we enter the first year of an ambitious five-year plan, we are excited to share our vision and strategy with Indigenous Alberta, including Indigenous Tourism Entrepreneurs, Indigenous communities, tourism operations, tourism marketing partners and municipal and provincial government organizations who want to learn about and participate in the energy and power of Indigenous tourism.

Indigenous tourism has the power to change perspectives, preserve culture, language and traditions and provide our Indigenous Tourism Entrepreneurs and Indigenous communities with a platform to be the leading voice in reclaiming our space in history — both ancient and modern.

It is our tradition and culture to share with and welcome visitors to our territories since time immemorial. Our communities are guided by values of respect, honour and integrity. The experiences listed in this guide demonstrate how Indigenous Tourism Entrepreneurs and Indigenous communities, both urban and rural, welcome visitors to learn, share and celebrate together.

This strategy is industry driven, industry lead and directed by Indigenous People. Through a unified industry voice, Indigenous Tourism Alberta focuses on creating partnerships between associations, organizations, governments and industry leaders from across Alberta to support the growth of Indigenous tourism.

We are happy to share these experiences with you over the next pages and invite you to experience the power of Indigenous tourism for yourself one day soon.

This is the dawn of a new and exciting age of Indigenous tourism.

Sincerely,



**Brenda Holder**  
Chair, Indigenous Tourism Alberta



**Lori Beaver**  
Executive Director, Indigenous Tourism Alberta



**Honourable Ricardo Miranda**  
Minister of Culture and Tourism  
Government of Alberta

## MESSAGE FROM THE MINISTER

*'Congratulations to the board and staff of Indigenous Tourism Alberta on the release of their inaugural Indigenous tourism strategy for the province. The strategy is an important milestone that will help support the continued growth of Indigenous tourism in Alberta. We know Indigenous peoples have a rich history and inspiring stories to share with Albertans and all visitors. This strategy will enable those stories, along with many authentic cultural offerings and experiences, to flourish while creating a tremendous opportunity for job creation and growth in Indigenous communities throughout the province. Thank you to everyone involved in this monumental project. I wish Indigenous Tourism Alberta every success and look forward to an ongoing, meaningful and collaborative relationship.'*



# Introduction to the Strategy

The Indigenous Tourism Alberta Strategy 2019-2023 lays out the strategy we are following for the next five years to help grow Alberta's Indigenous tourism industry and help Alberta reach its full potential as a tourism destination. Our plan for how we will win, together.

The tourism marketplace is demonstrating a significant demand for authentic, meaningful experiences. This five-year strategy is designed to respond to this demand through development and marketing of Indigenous experiences that are market and export-ready delivering a meaningful and memorable experience to travellers to Alberta.

Extensive research has recently been completed measuring the economic impact of Indigenous tourism in Canada. This research shows that the Indigenous tourism industry in Canada employs more than 33,000 people and produces \$1.4 billion of Canada's annual GDP. This research also identified a list of barriers or challenges that hinder the growth and sustainability of Canada's Indigenous tourism industry.

From this research and in response to the identified barriers, this strategic plan is based on understanding the reality of the challenges and identifies key opportunities to strategically overcome obstacles to success and foster a thriving Indigenous tourism economy.

## STRATEGIC PRIORITIES OF THE FIVE-YEAR PLAN

- Lead the growth and development of Alberta's Indigenous tourism industry;
- Develop sustainable market-ready and export-ready Indigenous tourism products;
- Increase demand for Alberta's Indigenous tourism experiences.

## KEY OPPORTUNITIES

- Strengthen the quantity and quality of Alberta's Indigenous tourism experiences to be competitive with other Canadian travel destinations;
- Increase awareness and demand for Indigenous tourism in Alberta;
- Change the common traveller perception that all Indigenous tourism experiences are the same;
- Align the efforts and interests of Alberta's tourism industry under a common Indigenous tourism strategy.

## ECONOMIC GROWTH TARGETS

- Increase provincial Indigenous tourism expenditures by \$35 million (+25%) by 2023;
- Increase provincial Indigenous tourism businesses from 66 to 100 (+52%) by 2023.

## Regional Engagement Sessions Undertaken to Develop the Strategy

In addition to the comprehensive research conducted in the development of the Indigenous Tourism Alberta Strategy 2019-2023, Indigenous Tourism Alberta in partnership with the Indigenous Tourism Association of Canada has carried out targeted discussions with key Alberta Indigenous cultural tourism stakeholders to seek input and guidance on the strategy.

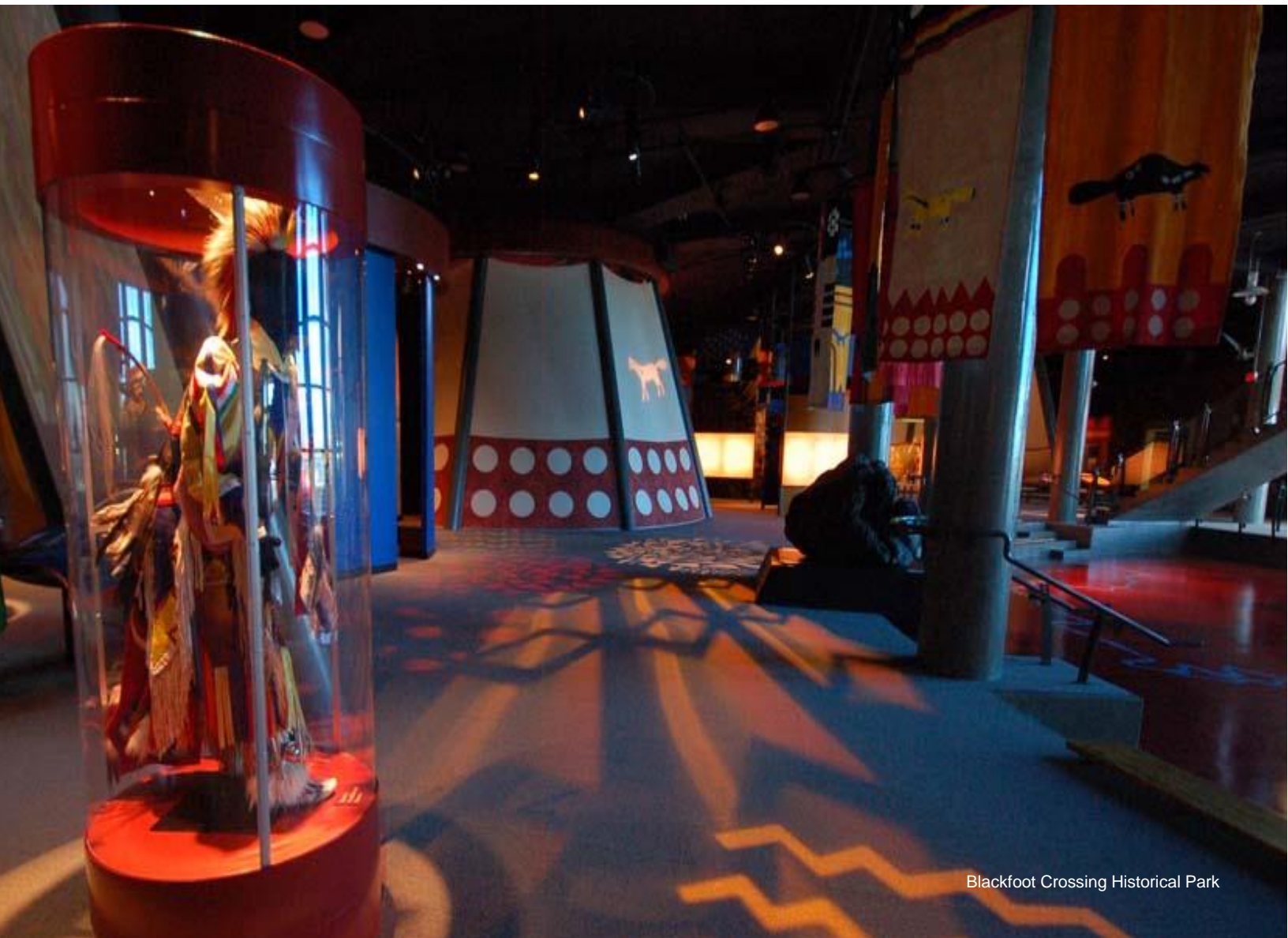
Feedback and data were collected from May to October 2017 through the following programs:

- In-person discussions with 135+ total participants during eight regional engagement sessions in Alberta from May to June, 2017
- 78 feedback forms filled out by regional engagement session participants
- 60 on-line survey forms filled out by contacts involved in Indigenous tourism in Alberta

The key goals and actions in this Strategy were presented to the Indigenous Alberta board members as well as a range of key stakeholders and industry leaders between February and June and 2018.

The goals outlined in the Strategy will be implemented in collaboration with industry partners over three years.

Ongoing engagement and partnership at a provincial and local level is imperative to its successful implementation. Achievements will be monitored, reviewed and shared with stakeholders on an annual basis.



# Organizational Overview

Incorporated in 2018 as a not-for-profit society, Indigenous Tourism Alberta (ITA) provides leadership in the development and marketing of authentic Indigenous tourism experiences through innovative partnerships. The ITA board consists of 8 board members from across Alberta.

## Our Mission

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

## Our Vision

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

## Our Strategy

To grow Alberta's Indigenous Tourism economy more than \$20M by 2021 by inspiring local, national and international visitors to experience Alberta's indigenous culture and history.

## BOARD OF DIRECTORS

As of June 1, 2018

The primary duty and responsibility of the ITA Board of Directors is to provide appropriate governance and strategic oversight of Indigenous Tourism Alberta such that Indigenous Tourism Alberta fulfills its mandate following good corporate governance practices.

Members of the Board were recruited from qualified Indigenous tourism leaders who collectively have the full range of competencies, experience or personal attributes required to provide effective governance of the Corporation.

### **Brenda Holder – Chair**

Mahikan Trails  
Canmore

### **Hal Eagletail – Board Member**

Eaglestar Enterprises  
Tsuut'ina Nation

### **Tim Patterson – Vice Chair**

Indigenous Hiking Guide  
Calgary

### **Joe Urie – Board Member**

Jasper Tour Company  
Jasper

### **Charmaine Willier-Larsen – Treasurer**

Sucker Creek First Nation

### **Dion Redgun – Board Member**

River Ranche Tourism  
Siksika

### **John Vernon Ritchie – Secretary**

Hideaway Adventure Grounds  
Kikino Métis Settlement

## MISSION

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

## VISION

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

## STRATEGY

To grow Alberta's Indigenous Tourism economy more than \$20M by 2021 by inspiring local, national and international visitors to experience Alberta's indigenous culture and history.



## Our Guiding Principles

1. Work to enable collective support, promotion and marketing of authentic Indigenous tourism businesses in a respecting protocol.
2. Support the improvement of the socio-economic situation of Indigenous people through tourism growth within Alberta via provision of:
  - a. economic development and marketing programs;
  - b. professional development including training, education, industry research, trends, best practices and market expectations;
  - c. advocacy, leadership and representation;
  - d. meaningful and effective long-term partnerships.
3. Maximize the opportunity to inspire excellence in Indigenous tourism across Alberta.
4. Demonstrate ITA's important contribution to the provincial economy.
5. Support the authority of each Indigenous community to determine their own cultural protocols and boundaries and recognize all the diverse values and beliefs of our First Nations, Métis and Inuit members.
6. Encourage authentic experiences involving Indigenous people in the development and delivery of the experience.
7. Partner and collaborate with multi-level destination marketing organizations, individual tourism businesses, sector tourism organizations and government agencies.
8. Develop and deliver strategic priorities based on recent research and tourism market intelligence in Alberta from multiple and highly informed sources.
9. Foster collaboration through efforts to unite the Indigenous tourism industry in Alberta.

Indigenous tourism offers the experiential traveller a cultural, spiritual and meaningful tourism experience that they cannot get anywhere else. Art, crafts, food, music, dance and cultural experiences bring the visitor closer to a proud and compelling culture. This is an experience that cannot be found anywhere else.

Our Ancestors have shared our culture with visitors to our traditional territories since time immemorial, closely guided by their community values of respect, honour and integrity. To succeed, our industry needs to respect those same values. It makes for an “authentic” experience for our visitor, while helping to ensure that our future generations have that same opportunity. Within our industry of Indigenous cultural tourism, it is equally important to protect the authenticity of the experience.

ITAC has endorsed the following definitions specific to Indigenous tourism, as they resulted from previous national and extensive consultation of industry, Elders and community.

**Indigenous 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 Indigenous community and traditional territory where the operation resides.

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

**Indigenous Cultural Experiences** – does not meet the Indigenous tourism criteria however offers the visitor a cultural experience in a manner that is appropriate, respectful and true to the Indigenous culture being portrayed.

**Indigenous Culinary Tourism** – provides culinary experiences, including foraging and preparing that represents or respects indigenous culture and traditions.

## Tourism Industry Context

Tourism has become one of the largest and fastest growing economic sectors in the world. It is expected to continue to grow over the next 10-15 years due to the rapidly growing middle class in emerging economies such as China, steady economic growth in developed countries and they rebound from the 2008 global economic crisis, and the importance of travel from a rapidly growing millennial traveller segment.

According to the World Tourism Organization (UNWTO), international tourist receipts grew by 4.4% worldwide in 2015 to an estimated \$1,260 billion USD spend by 1.186 billion travellers.

Canada welcomed close to 20 million international overnight visitors in 2016, just shy of the record 20.06 million arrivals in 2002<sup>1</sup>. With world tourism growth at 3.9%, Canada's growth of 11.1% is its strongest in 30 years. Not since Expo 86 has Canada seen such a rise in demand.

Approximately 17.7 million of Canada's visitors arrived from 11 markets Canada actively markets to, representing a combined \$15.5 billion<sup>2</sup> in revenue for the nearly 200,000 tourism businesses across Canada<sup>3</sup>, and support for over 637,000 jobs in the sector<sup>4</sup>.

In Alberta, 34.1 million total person visits were made in 2015 to destinations in Alberta by residents of Alberta, other parts of Canada, the United States and overseas countries. Of the 34.1 million total visits in the province, 28.9 million (84.7%) were by Albertans. Another 3.4 million (9.9%) were by residents of other parts of Canada. The remaining 1.8 million visits (5.4%) came from the U.S. (2.6%) and overseas (2.8%). In 2015, 34.1 million total person-visits were made to Alberta. Direct tourism expenditures by these visitors amounted to approximately \$8.1 billion<sup>5</sup>.

### INDIGENOUS TOURISM IN CANADA

The 2015 National Aboriginal Tourism Research Project measured the economic impact of Indigenous tourism 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<sup>6</sup>

The Indigenous tourism industry, and its economic impact, has grown substantially in Canada:

**Direct employment** of the Indigenous tourism sector has increased. In 2002, there were an estimated 12,566 people employed. Today it is estimated to be three times larger at an estimated 33,100.

**Direct gross output** from Indigenous tourism businesses has increased. The growth is an estimated \$0.37 billion at \$2.65 billion in 2014, up over 16% from \$2.28 billion in 2002.

Extrapolating the Canadian data, Indigenous Tourism in Alberta is worth \$130 million of GDP today with tremendous upside potential.

1. Statistics Canada, International Travel Survey, 2016.

2. Destination Canada Research estimates

3. Destination Canada Research using data from Statistics Canada's Tourism Satellite Account and Business Register, 2015

4. Statistics Canada, National Tourism Indicators, 3rd Quarter, 2016.

5. Tourism in Alberta 2015, Alberta Government

6. National Aboriginal Tourism Research Project 2015, April 2015, page xiii

# Visitor Demand for Indigenous Tourism Experiences

A review of ITAC research and a global scan of Indigenous tourism research reveals several key insights that guide this strategy.

## INTERNATIONAL MARKET DEMAND

Indigenous tourism operators often overestimate international visitor demand for Indigenous experiences. Despite claims about international visitor interest, visitors have generally low spontaneous / top-of-mind awareness of Indigenous tourism experiences.

The incidence level of travelers in Canada participating in an Indigenous tourism differs by market; based on the 11 target markets of Destination Canada, importance is highest in France, China, India, Germany, South Korea and Mexico; importance is lower in the United States, Brazil, the United Kingdom, Australia, and Japan.

Travellers seeking cultural and authentic experiences are significantly more interested in indigenous experiences than other traveller segments.

In terms of types of experiences, 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 and traditions;
- Entertainment oriented experiences and those that distance the traveler from Indigenous people are of lesser value and interest.

## DOMESTIC MARKET DEMAND

Research suggest that domestic visitors have only moderate interest in Indigenous tourism. There is low awareness amongst the domestic Canadian market that Indigenous tourism experiences are available.

Significantly, consumers see the product offerings as reasonably homogenous. As a result, visitors often have a "seen one, seen them all" attitude that discourages visits to multiple experiences. This has been identified as a priority in this strategy.

A lack of time, involvement in other activities, and expensive/budget are repeatedly cited as reasons for not participating in Indigenous tourism.

## TRAVELLER PURCHASE BEHAVIOR

Results from research led by Destination Canada, Travel Yukon and the Travel Activities and Motivation Survey Aboriginal Tourism Report lead to the conclusion that for most travelers, engagement in Indigenous tourism experiences is a much valued 'add-on' that arises as an unanticipated side benefit in a broader purposed trip. Indigenous tourism opportunities are normally sought out while on trips, as opposed to during the pre-trip destination planning process.

## INDIGENOUS TOURISM IS AN EMERGING SECTOR

Indigenous tourism is an emerging sector in the tourism industry with significant potential to help Canada attract travelers from their major target markets around the world. As a result, the tourism industry, governments and associations at all levels (federal, provincial and local) have identified an opportunity to develop and market Indigenous tourism in Canada.

*'I am doing my best to help contribute knowledge that I collect through traveling and cooking in indigenous communities. If you can speak through food, then you can speak through a ton of different concepts and platforms and always remember who you are with and the stories you are going to create*

**Shane Mederic Chartrand**  
Chef De Cuisine/ SC, River Cree Resort & Casino



## Alberta Indigenous Tourism Product Analysis

Having a wide range of authentic products and experiences is the essential foundation for the success of the Indigenous tourism sector. Businesses may be export-ready, market-ready or developing. Without a critical mass of tourism experiences, it is very difficult to sustain visitor interested and market demand.

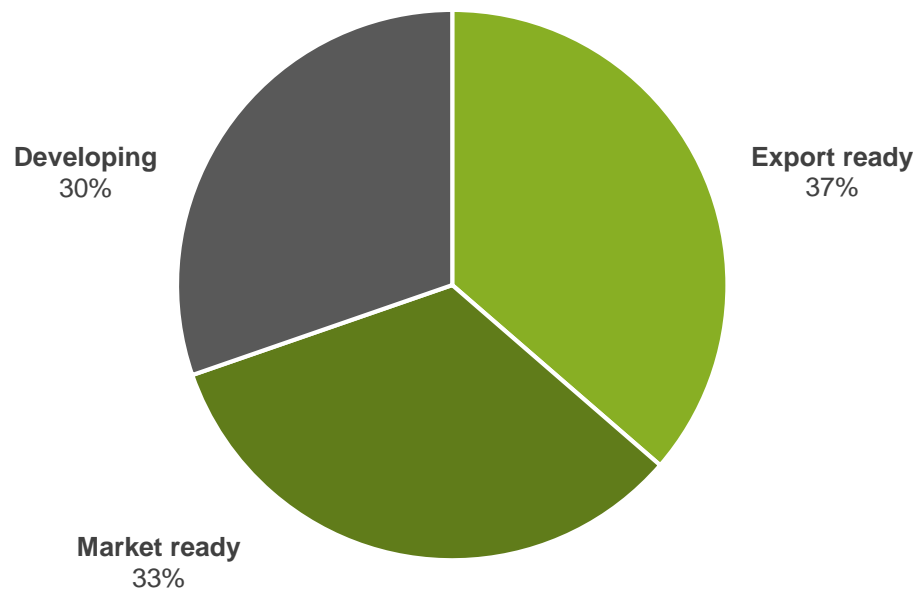
In looking at tourism experiences, we categorize them as follows:

**Export-ready** experiences meet the diverse needs and expectations of diverse international markets. This includes reservation, marketing, pricing, tour operator and travel trade needs.

**Market-ready** experiences provides a consistent, experience for visitors with year-round marketing and reservation services.

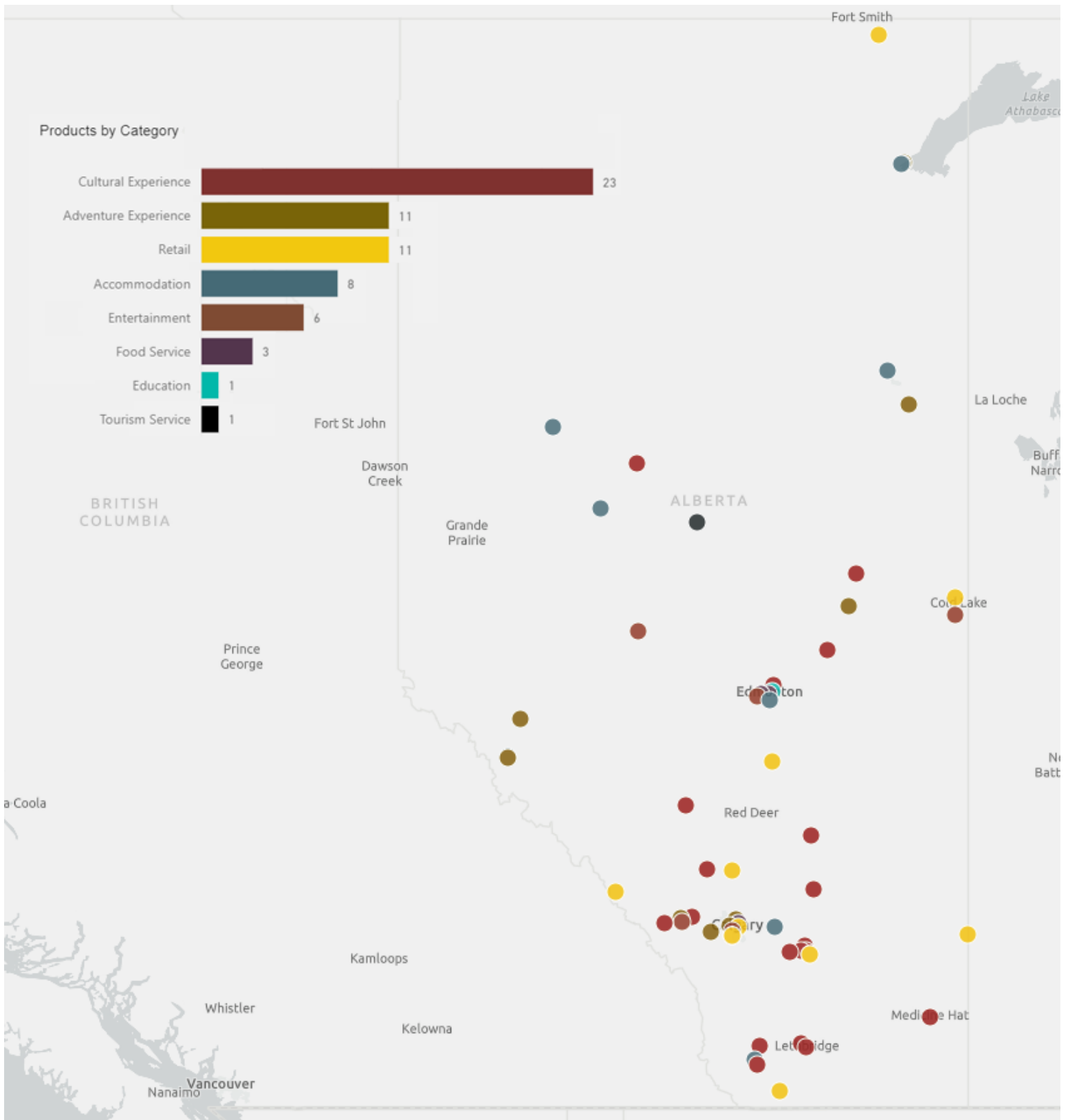
**Developing** experiences Is building an authentic and compelling product or experience, but not yet ready to go to market.

In Alberta, the current inventory of Indigenous tourism experiences is equally distributed across the three stages of development:



## ALBERTA INDIGENOUS TOURISM PRODUCT GEOGRAPHIC DISTRIBUTION

An analysis of the distribution of existing Indigenous tourism experiences across Alberta reveals strengths in the Calgary – Banff corridor, Edmonton and area and southern Alberta. This will help focus future product development.



## Misperception About the Homogeneity of Indigenous Culture

One of the more significant challenges we have is that travellers and residents often have a misperception about the homogeneity of Indigenous culture. This limits their interest in exploring multiple travel experiences.

By identifying the diversity of experiences, we can increase the interest in travelling around the province and give our marketing partners a stronger story to tell.

The most relevant distinction between culture and experiences aligns with the three active Treaty regions in Alberta, plus the historic Métis Communities and Métis Regions.

This will be realized in marketing by telling the story of each region, highlighting the experiences and connecting the regions into one overall Indigenous tourism story. The focus is on giving visitors reasons to explore more than one experience.



## Access Points

When building demand for tourism experiences in a destination, its important to understand the access points that travellers utilize to explore a destination. There are geographic and experiential access points to Indigenous tourism.

### GEOGRAPHIC ACCESS POINTS

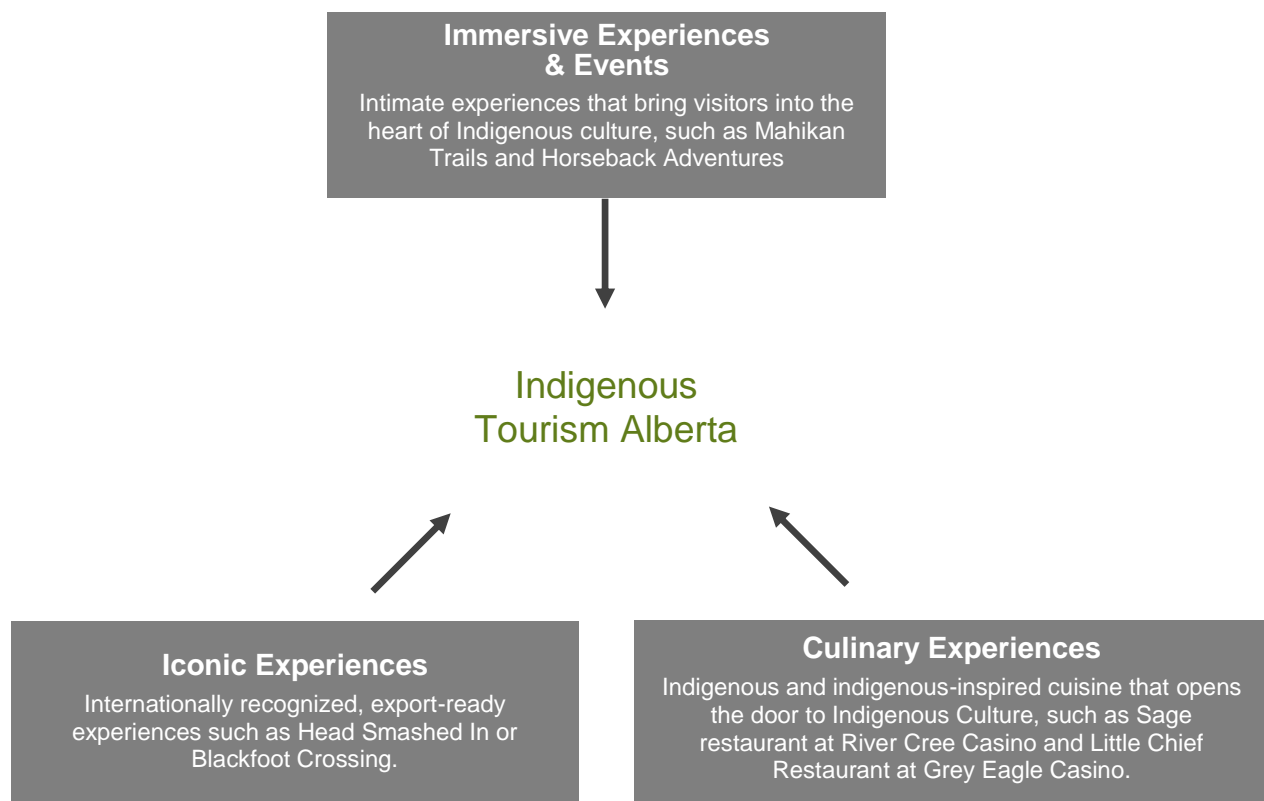
The geographic access points are the places that people stay and main traffic corridors:

- Calgary
- Edmonton
- Banff
- Jasper
- Highway 1
- Queen Elizabeth Highway (2)
- Highway 16

Nearby experiences will benefit from a larger pool of potential visitors.

### EXPERIENTIAL ACCESS POINTS

More importantly are experience access points. Places and experiences that provide an authentic, rewarding and inspiring entry into a broader range of indigenous tourism experiences.



Marketing will lead with these access points to build visitor interest and then introduce the visitor to the full range and depth of Indigenous tourism experiences in Alberta.

## Audience Analysis

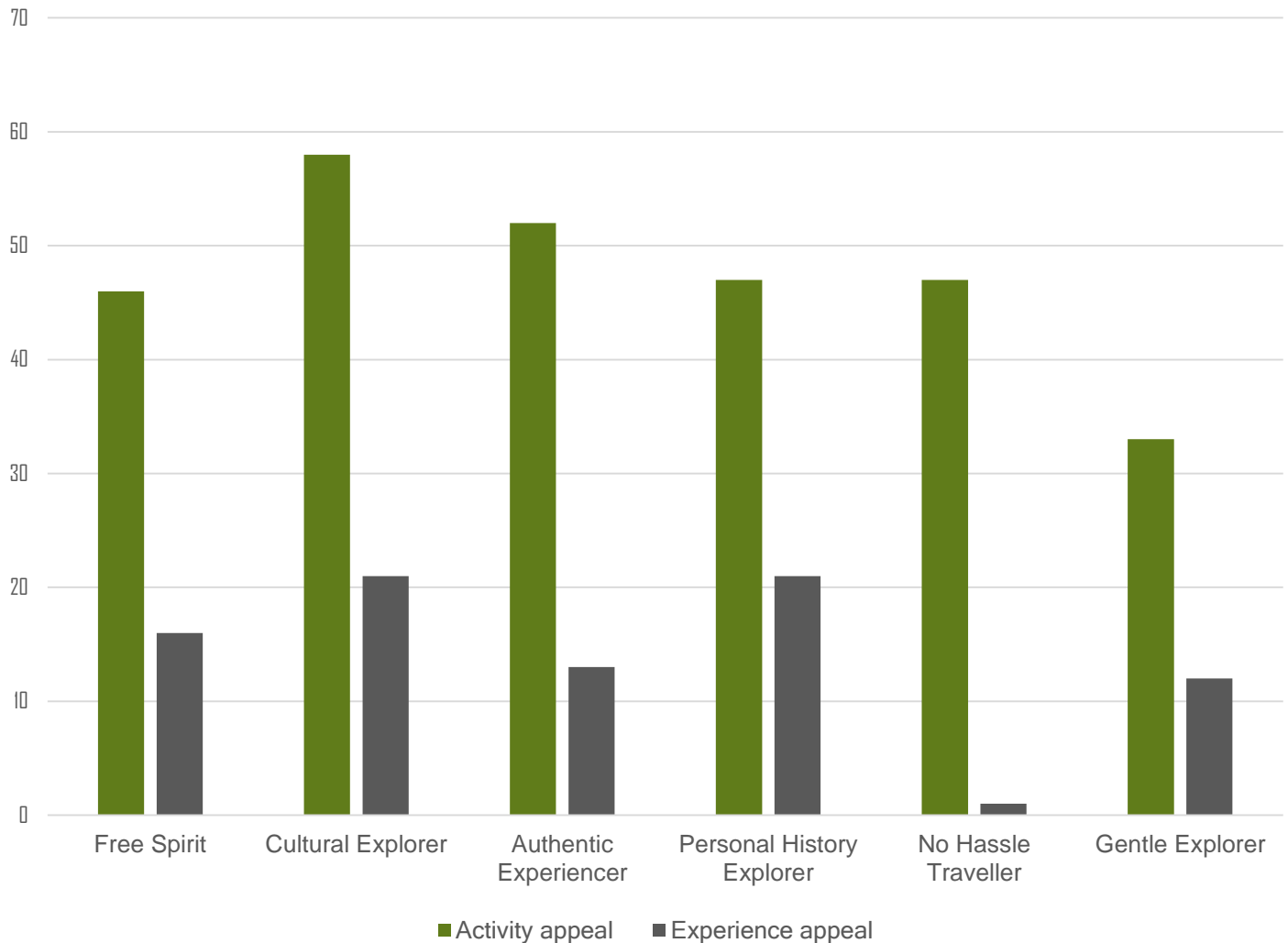
Most of our tourism marketing partners, including Travel Alberta, Destination Canada, and the regional destination marketing organizations use a psychographic segmentation model to identify and focus on key visitor segments.

The **Explorer Quotient (EQ)** provides tourism businesses with valuable insights into why and how different people like to travel. EQ goes beyond traditional market research of defining people. It looks deeper at individuals' personal beliefs, social values and views of the world to learn exactly why different types of travellers seek out entirely different travel experiences.

EQ specifically measures visitors interest and motivation to experience Indigenous culture.

Considering their interest in traveller for the purpose of an Indigenous experience and the appeal of an Indigenous experience once they are here, Cultural Explorers stand out at the best target market.

### Indigenous Tourism Appeal



# Understanding our Best Travel Customer

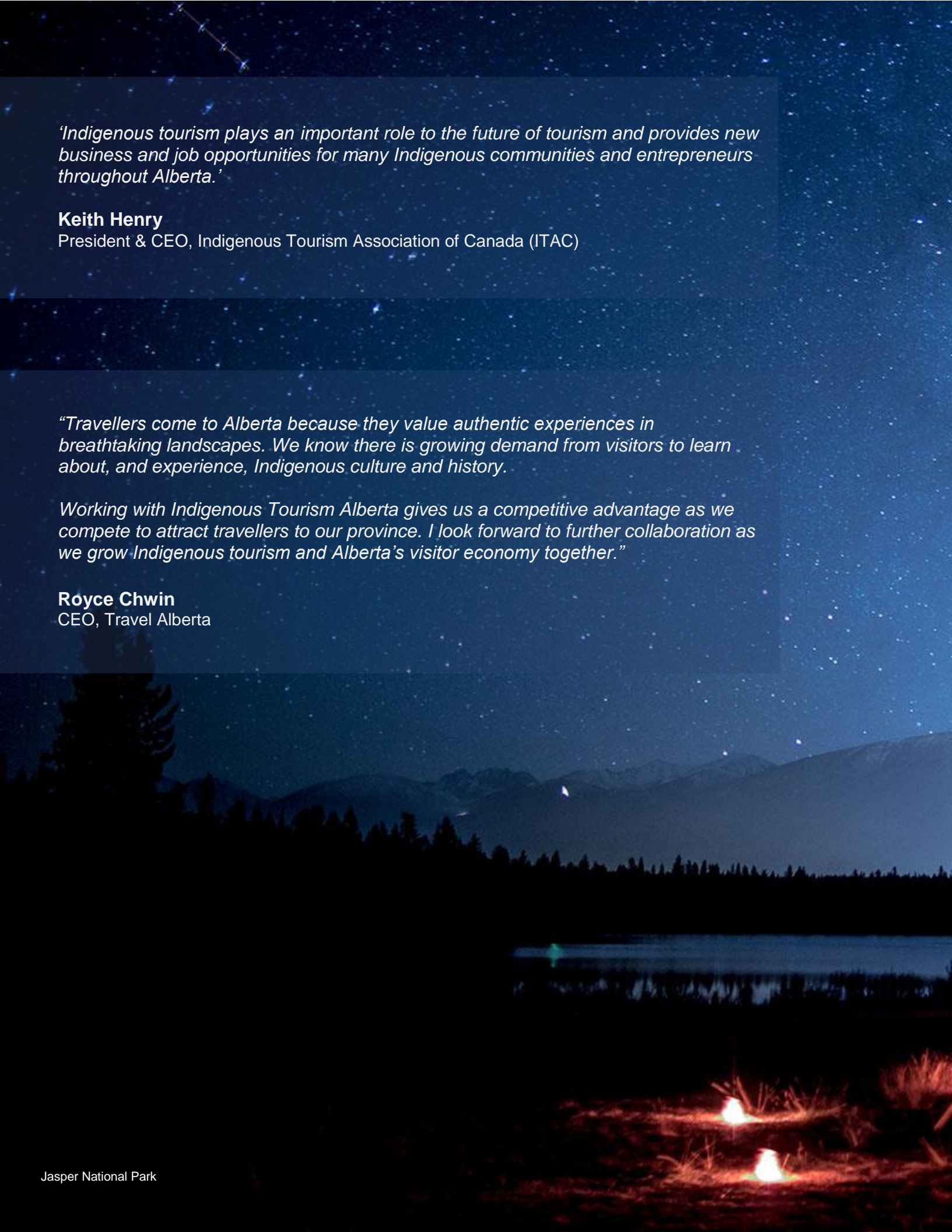
**Cultural Explorers** are the EQ segment most interested in Indigenous tourism experiences. They are also interested in related experiences, including:

- Wildlife viewing
- Interpretative centres and museums
- Local arts and craft studios
- Dining at restaurants offering local ingredients
- Multi-cultural experiences
- Visiting World Heritage Sites
- Visiting casinos



## CULTURAL EXPLORER CHARACTERISTICS

- Cultural Explorers want to meet and get to know the locals. This makes meeting Elders and eating traditional foods appealing. They want to embrace, discover and immerse themselves in the landscape of a destination.
- A Cultural Explorer is most likely to be travelling without kids, so adult-focused experiences are appropriate.
- Spontaneity and novelty are important and could be delivered through indigenous activities. Shared experiences are valued, but they tend to shy away from large crowds.
- While financially well-off, Cultural Explorers are still careful with their money.
- Information found in travel guides as well as through online travel information are valued by the Cultural Explorer.
- Peer-to-peer is very important. Cultural explorers are very strong advocates for a destination, particularly sharing photos on social media. Guiding them to the best places for that magic moment is important.
- Cultural Explorers are one of the three primary target audiences of Destination Canada and many of Alberta's destination marketing organizations.
- There are additional EQ types that are interested in the activities associated with Indigenous experiences and they will be reached through the marketing efforts focused specifically on Cultural Explorers.



*'Indigenous tourism plays an important role to the future of tourism and provides new business and job opportunities for many Indigenous communities and entrepreneurs throughout Alberta.'*

**Keith Henry**

President & CEO, Indigenous Tourism Association of Canada (ITAC)

*"Travellers come to Alberta because they value authentic experiences in breathtaking landscapes. We know there is growing demand from visitors to learn about, and experience, Indigenous culture and history.*

*Working with Indigenous Tourism Alberta gives us a competitive advantage as we compete to attract travellers to our province. I look forward to further collaboration as we grow Indigenous tourism and Alberta's visitor economy together."*

**Royce Chwin**

CEO, Travel Alberta

## Working Together as Team Indigenous Alberta

Tourism is a complex industry. Alberta's tourism industry is built on a foundation of established networks - national, provincial, regional and city/community Destination Marketing Organizations as well as business and sector associations - that provide marketing and experience development programs to support the 19,000 tourism businesses in Alberta.

Key to the success of the Indigenous Tourism Alberta Strategy will be our ability to foster collaboration, build partnerships and work better together to grow Alberta's Indigenous tourism economy. By working together, we will continue to improve Indigenous tourism development and marketing, we will grow revenues for Indigenous tourism businesses and the province, and ultimately, we will be aligned in the eyes of potential travellers.



### PRODUCT DEVELOPMENT

Alberta's Indigenous tourism experiences need to remain relevant and compelling to travellers in an increasingly competitive global context. We will be working collaboratively with Indigenous communities, governments, businesses, Destination Marketing Organizations, and industry stakeholders to address the need for an Alberta Indigenous Tourism Product Development Strategy. This strategy will inform private and public-sector investment in new Indigenous tourism experiences and infrastructure, and build long-term demand, enhancing Alberta as a destination of choice.

To elevate Alberta's Indigenous tourism business operators' ability to compete domestically and globally, it is important we develop and enhance Alberta's current and future Indigenous tourism products strategically. Development plans and strategies are needed for all of Alberta's five distinct Indigenous regions, and we need to work collaboratively and build partnerships to find the best way to develop and move these plans forward. It is essential we do this with a common vision in each planning area.

It will be important to undertake realistic assessments of product gaps vis-à-vis tourist flows and demand patterns thus moving away from supply-led, 'build it and they will come', approaches to demand-driven product development. A fact-based assessment will provide communities with valuable insights to identify potential products and experiences that will have economic sustainability.

A strong focus on destination development will not only strengthen Alberta's Indigenous tourism economy, it will help make Alberta a highly recommended travel destination in North America.

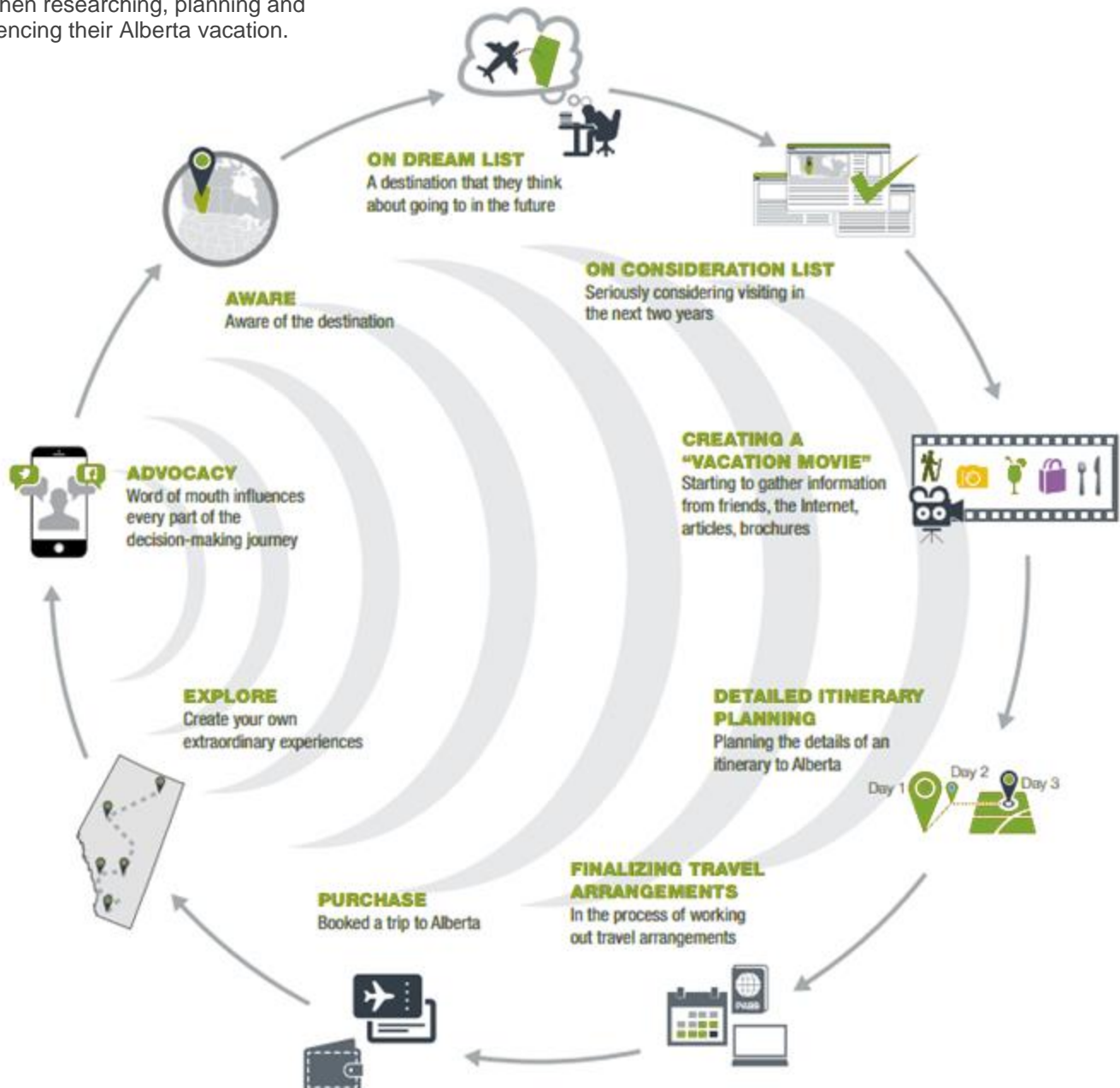
## MARKETING

Our goal is to inspire Albertans to keep exploring Indigenous experience in Alberta, while at the same time, driving awareness of Alberta Indigenous experiences in target long-haul and international markets. Travellers coming from outside Alberta bring new dollars and incremental export revenue into the province, propelling and diversifying our provincial economy. In both cases, we want to move travellers down the path to purchase, inspire them to travel more, stay longer and share their authentic Alberta experiences with others.

Key to our success in effectively and efficiently delivering on the Indigenous Tourism Alberta Strategy is working with tourism marketing partners at the provincial and regional levels to clearly define roles and responsibilities. This will ensure our regional and international marketing efforts are aligned, and that we are working towards common goals and performance outcomes. Through industry alignment, consistent messaging and strength in numbers, we will enhance our ability to generate traveller interest in Alberta's Indigenous experiences.

### Traveller Path to Purchase

Outlines the key steps leisure travellers take when researching, planning and experiencing their Alberta vacation.



*"We welcome the establishment of Indigenous Tourism Alberta and look forward to working together to grow the Indigenous tourism industry in this province."*

**Juanita Marois**  
Development Manager, Metis Crossing



Metis Crossing



Metis Crossing



Metis Crossing

# Strategic Priorities 2019-2020

The Indigenous Tourism Alberta Strategy 2019-2021 will capitalise on the opportunities presented by the growing interest and demand for Indigenous experiences among an increasingly diverse range of traveller and consumer interests.

The successful implementation of these strategic priorities will require commitment and involvement at a provincial, regional and local level from both Government and industry, with Indigenous Tourism Alberta providing the strategic leadership.

## Strategic Priorities:

- PRIORITY 1: Lead the growth and development of Alberta's Indigenous tourism industry.**
- PRIORITY 2: Develop sustainable market-ready and export-ready Indigenous tourism products.**
- PRIORITY 3: Increase demand for Alberta's Indigenous tourism experiences.**

## PRIORITY 1: Lead the growth and development of Alberta's Indigenous tourism industry.

Indigenous Tourism Alberta will take an active leadership role in encouraging and educating the broader tourism industry to better understand and integrate Indigenous tourism into the visitor economy, and to develop stronger partnerships with Indigenous cultural tourism experiences in Alberta.

To ensure the successful delivery of the Strategy, Indigenous Tourism Alberta will develop a cultural awareness program to ensure its staff continues to develop a deeper understanding of Indigenous culture and community. Cultural awareness training opportunities will also be presented to Destination Marketing Partners and their stakeholders to ensure all tourism development and marketing activities are delivered in a culturally sensitive manner.

Through the delivery of positive industry awareness and demonstrated accountability to delivering on the priorities outlined in the Strategy, we will lead a coordinated approach with our industry partners to grow Indigenous tourism in Alberta.

ACTION	PARTNERS	TIME FRAME					
		2018	2019	2020	2021	2022	2023
1.1 Align industry around a three-year Indigenous Tourism Alberta Strategy.	<b>Lead:</b> ITA <b>Partners:</b> ITAC, Government of Alberta, Travel Alberta	→					
1.2 Establish a sustainable funding framework for ITA.	<b>Lead:</b> ITA <b>Partners:</b> ITAC, Government of Alberta, Private Industry		→	→	→		
1.3 Develop a stakeholder-based membership model for Indigenous tourism operators and other tourism stakeholders.	<b>Lead:</b> ITA <b>Partners:</b> ITAC		→	→			
1.4 Establish essential business operations, staff, and contracted support to fulfill key priorities and actions to meet our three-year strategy performance targets.	<b>Lead:</b> ITA <b>Partners:</b> ITAC, Government of Alberta		→	→			
1.5 Develop corporate communications programs including an industry website to build awareness of ITA, the Indigenous Tourism Alberta Strategy, available education programs and support resources.	<b>Lead:</b> ITA		→				
1.6 Develop a cultural awareness program to ensure all Destination Marketing Partners' tourism development and marketing activities are delivered in a culturally sensitive manner.	<b>Lead:</b> ITA <b>Partners:</b> Government of Alberta, Destination Marketing Partners		→	→			
1.7 Build support for Indigenous tourism within the leadership of local communities to grow their commitment to training and development.	<b>Lead:</b> ITA <b>Partners:</b> ITAC, Government of Alberta		→	→	→	→	→
1.8 Demonstrate value to Indigenous tourism operators, provincial and municipal governments, partners, and funding providers.	<b>Lead:</b> ITA <b>Partners:</b> Government of Alberta, Destination Marketing Partners		→	→	→	→	→
1.9 Develop measures of tourism expenditures consistent with ITAC and Government of Alberta.	<b>Lead:</b> ITA <b>Partners:</b> ITAC, Government of Alberta	→					

## PRIORITY 2: Develop sustainable market-ready and export-ready Indigenous tourism products.

Indigenous Tourism Alberta will continue to work closely with Government agencies, Destination Marketing and Development Partners, and industry stakeholders to support the development of sustainable market-ready and export-ready Indigenous cultural tourism products across Alberta.

Long-term, strategic investment in product development and enhancement are essential to building a strong and sustainable Indigenous tourism industry in Alberta. Our focus will be supporting the development of Indigenous tourism experiences that provide the high-quality, meaningful, and enriching cultural experiences that travellers seek. Key to our success will be the development of training and support programs to assist new and established Indigenous Tourism Operators develop and grow their business.

ACTION	PARTNERS	TIME FRAME					
		2018	2019	2020	2021	2022	2023
2.1 Work in partnership with indigenous communities, government, destination development and marketing partners to develop a 20-year Indigenous Tourism Product Development Plan.	<b>Lead:</b> ITA <b>Partners:</b> Government of Alberta, Travel Alberta		----->				
2.2 Develop and deliver Indigenous Tourism Readiness Guide and workshops to assist the development and enhancement of Indigenous tourism experiences.	<b>Lead:</b> ITA <b>Partners:</b> ITAC, Government of Alberta		----->				
2.3 Support ITAC's national Indigenous Tourism product recertification to assure consumers and travel trade that standards are being met and respected.	<b>Lead:</b> ITA, ITAC <b>Partners:</b> Indigenous Tourism Operators			----->			
2.4 Support the supply of leadership and business skills and labour to enhance visitor experiences through quality service, hospitality, and cultural protocols.	<b>Lead:</b> ITA <b>Partners:</b> ITAC, Government of Alberta			----->			
2.5 Develop case studies profiling successful Indigenous Tourism Operators to support and inform the ongoing growth of emerging and established businesses and experiences within the sector.	<b>Lead:</b> ITA <b>Partners:</b> Government of Alberta, Travel Alberta			----->			
2.6 Develop an annual Indigenous Tourism Summit for Indigenous tourism operators and tourism marketing partners to share best practices & provide educational opportunities.	<b>Lead:</b> ITA <b>Partners:</b> ITAC, Government of Alberta, Indigenous Tourism Operators, Destination Marketing Partners.			----->			

## PRIORITY 3: Increase demand for Alberta’s Indigenous tourism experiences.

There are now more than 60 market and export-ready Indigenous tourism experiences available in Alberta and new products in development, offering an increased opportunity for visitors to be immersed in Indigenous culture. Through a series of initiatives in collaboration with Alberta’s Indigenous tourism sector, ITA will raise consumer awareness of Alberta as a destination where Indigenous culture is strong, vibrant and diverse.

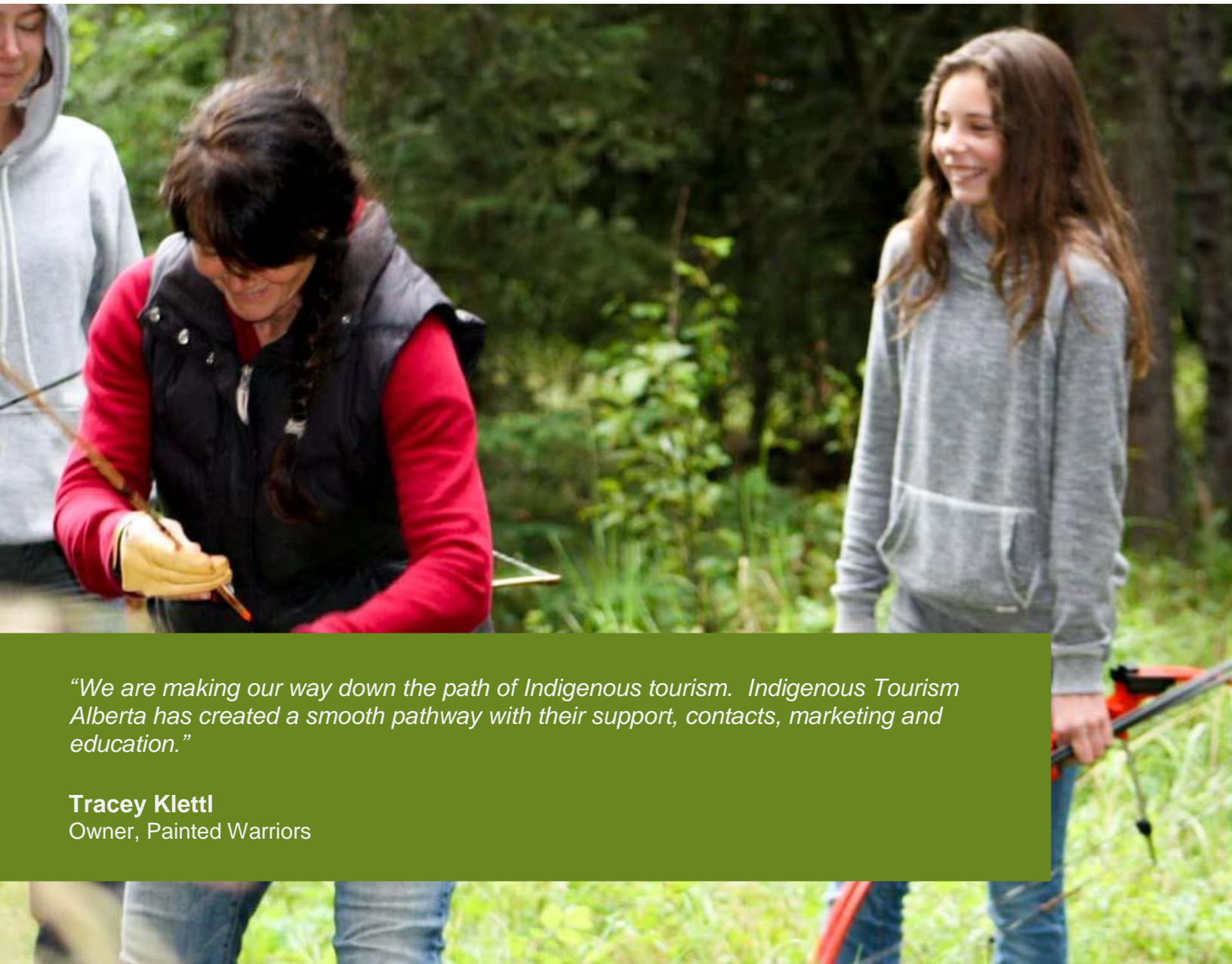
A key focus will be the development of compelling content in partnership with Alberta Destination Marketing Partners and Indigenous Tourism Operators to assist in telling the Indigenous stories of Alberta across partner marketing and travel trade activities.

ACTION	PARTNERS	TIME FRAME						
		2018	2019	2020	2021	2022	2023	
3.1 Work in partnership with provincial and regional destination marketing partners to develop a three-year marketing partnership agreement that defines roles and shared performance measures.	<b>Lead:</b> ITA <b>Partners:</b> Travel Alberta, Destination Marketing Partners, Culinary Tourism Alliance		---	→				
3.2 Develop an Indigenous Tourism consumer website and supporting content to showcase Alberta’s indigenous cultural heritage, distinct Indigenous areas, travel experiences, community stories, culinary experiences and suggested itineraries.	<b>Lead:</b> ITA <b>Partners:</b> Destination Marketing Partners, Indigenous Tourism Operators		---	→				
3.3 Capitalise on the growing global interest in cultural tourism by integrating Indigenous tourism as a key pillar in Destination Marketing Partners’ domestic and international marketing programs.	<b>Lead:</b> ITA <b>Partners:</b> Destination Marketing Partners		-----	-----	-----	-----	-----	→
3.4 Develop inspiring Indigenous tourism content that can be promoted on Destination Marketing Partners’ online marketing and communication channels, and visitor information centers.	<b>Lead:</b> ITA, Travel Alberta <b>Partners:</b> Destination Marketing Partners		-----	-----	-----	-----	-----	→
3.5 Maintain an accurate inventory of Indigenous tourism products and events in the Alberta Tourism Information Service (ATIS) and provide product updates to travel trade and media.	<b>Lead:</b> ITA, Travel Alberta <b>Partners:</b> Indigenous Tourism Operators		-----	-----	-----	-----	-----	→
3.6 Include Indigenous tourism experiences in Alberta Destination Marketing Partners’ media and travel trade familiarisation visits to provide education and first-hand experiences with the aim to increase trade distribution partners.	<b>Lead:</b> ITA, Travel Alberta <b>Partners:</b> Destination Marketing Partners, Indigenous Tourism Operators		-----	-----	-----	-----	-----	→
3.7 Develop and promote the Alberta Indigenous Tourism Product Guide showcasing export-ready Indigenous products to trade and industry partners and increase the inclusion of Indigenous tourism experiences in itineraries and packages promoted to consumers.	<b>Lead:</b> ITA, Travel Alberta <b>Partners:</b> Destination Marketing Partners, Indigenous Tourism Operators		-----	-----	-----	-----	-----	→
3.8 Assist export-ready Indigenous tourism experiences to be included in Alberta’s international trade marketing opportunities such as Canada’s West, and Rendezvous Canada.	<b>Lead:</b> ITA, Travel Alberta <b>Partners:</b> ITAC		-----	-----	-----	-----	-----	→

## Strategy Prioritization

URGENT	IMPORTANT	ACTION	
X	X	1.1	Align industry around a three-year Indigenous Tourism Alberta Strategy
X	X	1.2	Establish a sustainable funding framework for ITA.
X	X	1.3	Develop a stakeholder-based membership model for Indigenous tourism operators and other tourism stakeholders
X	X	1.4	Establish essential business operations, staff, and contracted support to fulfill key priorities and actions to meet our three-year strategy performance targets
X	X	1.5	Develop corporate communications programs including an industry website to build awareness of ITA, the Indigenous Tourism Alberta Strategy, available education programs and support resources.
X	X	1.8	Build support for Indigenous tourism within the leadership of local communities to grow their commitment to training and development.
X	X	1.9	Develop measures of tourism expenditures consistent with ITAC and Government of Alberta.
X	X	1.10	Demonstrate value to Indigenous tourism operators, provincial and municipal governments, partners, and funding providers.
X	X	2.1	Work in partnership with indigenous communities, government, destination development and marketing partners to develop a 20-year Indigenous Product Development Plan.
X	X	2.2	Develop and deliver Indigenous Tourism Readiness Guide and workshops to assist the development and enhancement of Indigenous tourism experiences.
X	X	3.1	Work in partnership with provincial and regional destination marketing partners to develop a three-year marketing partnership agreement that defines roles and shared performance measures.
X	X	3.2	Develop an Indigenous Tourism consumer website to showcase Alberta's indigenous cultural heritage, distinct Indigenous areas, travel experiences and suggested itineraries.
X	X	3.4	Develop Indigenous tourism content that can be promoted on Destination Marketing Partners' online marketing and communication channels, and visitor information centers
X	X	3.5	Maintain an accurate inventory of Indigenous tourism products and events in the Alberta Tourism Information Service (ATIS) and provide product updates to travel trade and media
X	X	3.7	Develop and promote the Alberta Indigenous Tourism Product Guide showcasing export-ready Indigenous products to trade and industry partners and increase the inclusion of Indigenous tourism experiences in itineraries and packages promoted to consumers.
	X	1.6	Develop a cultural awareness program to ensure all Destination Marketing Partners' tourism development and marketing activities are delivered in a culturally sensitive manner.
	X	2.3	Support ITAC's national Indigenous Tourism product recertification to assure consumers and travel trade that standards are being met and respected.

	X	2.4	Support the supply of leadership and business skills and labour to enhance visitor experiences through quality service, hospitality, and cultural protocols.
	X	2.5	Develop a suite of case studies profiling successful Indigenous Tourism Operators to support and inform the ongoing growth of emerging and established businesses and experiences within the sector.
	X	2.6	Develop an annual Indigenous Tourism Marketing Summit for Indigenous tourism operators and tourism marketing partners to share promising practices and provide educational opportunities.
	X	3.3	Capitalise on the growing global interest in cultural tourism by integrating Indigenous tourism as a key pillar in Destination Marketing Partners' domestic and international marketing programs.
	X	3.6	Include Indigenous tourism experiences in Alberta Destination Marketing Partners' media and travel trade familiarisation visits to provide education and first-hand experiences with the aim to increase trade distribution partners.
	X	3.8	Assist export-ready Indigenous tourism experiences to be included in Alberta's international trade marketing opportunities such as Canada's West, and Rendezvous Canada.



*“We are making our way down the path of Indigenous tourism. Indigenous Tourism Alberta has created a smooth pathway with their support, contacts, marketing and education.”*

**Tracey Klett**  
Owner, Painted Warriors

# ITA Corporate Scorecard

Indigenous Tourism Alberta utilizes a globally recognized performance tracking system to align our business activities to the vision and strategy of the organization, improve internal and external communications, and measure organizational performance against strategic priorities. We measure and report transparently through a corporate scorecard according to targets set within our strategic priorities and approved by Indigenous Tourism Alberta's Board of Directors.

ACTION	TARGETS					
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Sustainable operating funding secured through long-term partnerships	\$0.7M	\$1.6M	\$1.9M	\$2.0M	\$2.0M	\$2.0M
New market-ready experiences developed in partnership with industry	1	4	4	6	6	8
New export-ready experiences developed in partnership with industry	0	2	2	2	4	4
New Indigenous tourism businesses launched	0	4	6	8	8	10
Indigenous tourism operators and destination marketing partners participating in ITA learning & professional development programs	--	50	50	50	75	75
Media and travel trade familiarization tours featuring Alberta Indigenous tourism product	5	15	18	21	24	28
Lead referrals to Indigenous tourism operators from destination marketing partner marketing programs	25,000	75,000	100,000	130,000	165,000	200,000
Indigenous tourism industry satisfaction with ITA	--	80%	80%	80%	80%	80%
Marketing and Development as % of Overall Expenses	70%	85%	85%	85%	85%	85%



Chef Bill Alexander, Grey Eagle Resort and Casino

# Industry Performance Indicators & Resources

Tourism is a complex industry involving multiple stakeholders with varying goals and objectives. To properly monitor Alberta's visitor economy, Travel Alberta works with Alberta Culture and Tourism to consider a variety of industry metrics to measure competitiveness and sources of growth. This perspective is critical to stay informed, to respond to changing global market conditions and to stay connected to the ever-evolving traveller in an increasingly competitive marketplace.

## ALBERTA TOURISM MARKET MONITOR

This report is produced monthly by Alberta Culture and Tourism and highlights travel, visitation, accommodation and attendance statistics as well as tourism investment projects across the province.

## DESTINATION CANADA

Destination Canada is Canada's national tourism marketing organization and a rich resource for tourism information. This federal Crown corporation offers data, market intelligence, industry analysis and e-business initiatives to support strategic and operational decisions. Destination Canada regularly publishes a wide range of reports covering tourism research and intelligence. These reports include market highlights, traveller characteristics, trip purposes, activities, accommodations and more.

Reports of interest include:

- National tourism indicators
- Tourism monthly snapshot
- International and overseas visitor arrivals
- Global Tourism Watch
- Diio aviation market intelligence

## STATISTICS CANADA

We rely on surveys administered by Statistics Canada to determine visitation and expenditure from our domestic and international markets: Travel Survey of Residents of Canada (TSRC) and the International Travel Survey (ITS).

- The TSRC provides information on same day and overnight trips and the characteristics of Canadians who travelled within Canada during the reference period. This includes details on the duration of the trip, type of accommodation, reason for the trip, mode of transportation, expenditures and general demographic information.
- The ITS provides statistics on international travellers to and from Canada. This includes detailed characteristics of their trips such as expenditures, activities, places visited and length of stay.
- In 2018, the National Travel Survey (NTS) was introduced to collect information about the domestic and international travel of Canadian residents. The NTS was developed to fully replace the Travel Survey of Residents of Canada and partially replace the Canadian resident component of the International Travel Survey.

## TOURISM HR CANADA

Tourism HR Canada is a national organization working to identify and address labour market issues in the Canadian tourism sector. Its main goals include improving the quality and mobility of the tourism workforce and supplying tourism businesses with the labour market intelligence they need to plan for and overcome their current and future human resource challenges.

## CONFERENCE BOARD OF CANADA

The Conference Board of Canada's Canadian Tourism Research Institute serves the travel and tourism industry in providing sound economic forecasts and models. With timely and insightful interpretation of data specifically relevant to travel, subscribers are kept up-to-date on what's hot and what's not through Travel and Tourism Sector Trends Service Reports.

## Risks

Indigenous Tourism Alberta works with our industry partners each fiscal year to identify and review potential risks that could impact the Indigenous tourism sector. We develop options and actions to reduce threats to the execution of our action plan. Through this risk management process, we calculate the probability of an event or issue occurring, what the impact might be and mitigation actions.

LIKELIHOOD	CONSEQUENCES			
	Insignificant	Minor	Moderate	Major
Almost Certain			6	
Likely			3	5 1 2
Possible				4
Unlikely				

1. **Sustainable ITA Operating & Marketing Funding:** The risk that ITA will be unable to secure sustainable funding to support the successful execution of the Indigenous Tourism Alberta Strategy.
2. **Sustainable Tourism Marketing Partner Funding:** The risk of material changes in government policy and/or procedures, shifting of priorities, and the continuation of a sustainable funding model for Destination Canada, Travel Alberta, and regional destination marketing organizations.
3. **Lack of Marketable Indigenous Experiences:** The risk that product development and/or the marketability of new and existing product is not properly managed or invested effectively and efficiently.
4. **Industry Alignment:** The risk that Alberta's tourism industry is not aligned and supportive of the Indigenous Tourism Alberta Strategy. The Government of Alberta, destination marketing organizations, and industry operators must collaborate effectively as one team to deliver on Alberta's tourism brand promise to travellers.
5. **People:** The risk that ITA is unable to attract and retain the right team member skills and does not plan effectively for succession.
6. **Provincial Economy:** The risk that the province's current economic climate will impact Alberta's tourism marketing and development strategies and our efforts to support and grow the visitor economy in Alberta.

## Financial Investment Plan

To increase provincial Indigenous tourism expenditures by \$35 million (+25%) and Indigenous tourism businesses by 34 (+52%) by 2023, Indigenous Tourism Alberta financial investment plan is as follows.

	2018/19	2019/20	2020-2021	2021-22	2022-23
<b>Revenues</b>					
ITAC / Government of Alberta	\$ 100,000				
ITAC		\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000
Memberships		\$ 6,000	\$ 6,000	\$ 6,500	\$ 7,000
<b>Total Revenues</b>	<u>\$ 100,000</u>	<u>\$ 71,000</u>	<u>\$ 71,000</u>	<u>\$ 71,500</u>	<u>\$ 72,000</u>
<b>Expenses</b>					
Partnership	\$ 165,000	\$ 240,000	\$ 300,000	\$ 330,000	\$ 350,000
Leadership	\$ 280,000	\$ 400,000	\$ 420,000	\$ 400,000	\$ 400,000
Product Development	\$ 225,000	\$ 550,000	\$ 675,000	\$ 700,000	\$ 700,000
Marketing	\$ 125,000	\$ 400,000	\$ 500,000	\$ 550,000	\$ 550,000
<b>Total Investment</b>	<u>\$ 795,000</u>	<u>\$ 1,590,000</u>	<u>\$ 1,895,000</u>	<u>\$ 1,980,000</u>	<u>\$ 2,000,000</u>
<b>Operating Deficit</b>	<u>(\$ 695,000)</u>	<u>(\$ 1,519,000)</u>	<u>(\$ 1,824,000)</u>	<u>(\$ 1,905,500)</u>	<u>(\$ 1,928,000)</u>

### FINANCIAL ACCOUNTABILITY

ITA's Board of Directors provides governance over financial matters and reporting, systems of internal controls and the audit process while assisting the Board in fulfilling its fiduciary responsibilities.



## Glossary

**Alberta Indigenous Tourism Product Guide:** A publication that showcases export-ready Indigenous products to trade and industry partners to increase the inclusion of Indigenous tourism experiences in itineraries and packages promoted to consumers.

**Alberta Indigenous Tourism Readiness Guide:** A publication and corresponding training workshop to assist Alberta Indigenous Tourism Operators in becoming market and export-ready.

**Cultural Awareness Program:** A publication and corresponding training workshop to help Destination Marketing Partners' tourism deliver their marketing and product development programs in a culturally sensitive manner.

**Cultural Explorers:** Travellers seeking constant opportunities to embrace, discover and immerse themselves in the entire experience of the culture, people and settings of the places they visit. They often attempt to converse with locals, attend local cultural festivals, or go off the beaten track to discover how people truly live.

**Destination Canada:** The national tourism organization for Canada, a Crown corporation wholly owned by the government of Canada. Its vision is to inspire the world to explore Canada.

**Destination Marketing Organization (DMO):** A company or other entity involved in the business of increasing tourism to a destination or improving its public image.

**Expenditure:** (or traveller-spend): Dollars spent by travellers in destination.

**Explorer Quotient® (EQ):** An innovative research tool that identifies the underlying emotional motivators of travellers beyond traditional demographics like age and geography.

**Export Ready:** Refers to a business or experience that meets market-ready criteria and is prepared to market and partner with travel trade distribution sales channels. This includes understanding commission and net rate pricing plus agreeing to trade bookings and cancellation policies. Your tourism experience should be adapted to the interests, language and expectations of the International market you will pursue.

**Free Spirits:** Youthfully spirited adventurers looking for opportunities for fun and excitement in other places away from home. They travel for the emotional charge of doing things, and love to share their experiences with others.

**Indigenous Product Development Plan:** An Indigenous tourism product plan to be developed in partnership with indigenous communities, government, destination development and marketing partners to define long term strategic objectives and investment in developing and enhancing Indigenous travel experiences in Alberta.

**Indigenous Tourism Association of Canada (ITAC):** A not-for-profit society incorporated in 2015 to support the growth and prosperity of Indigenous tourism in Canada.

**Indigenous Tourism Marketing Summit:** An annual event for Indigenous tourism operators and tourism marketing partners to get together to share best practices and provide educational opportunities.

**Market Ready:** Refers to businesses or experiences that have all their licenses, permits and insurance in place to operate legally. The business or experience also meets or exceeds industry expectations for their sector, communicates with potential visitors year-round, and is ready to accept advanced reservations.

**Statistics Canada:** The Government of Canada government agency commissioned with producing statistics to help better understand Canada, its population, resources, economy, society, and culture.

**Travel Alberta:** Travel Alberta provides marketing expertise and destination development support to Alberta-based tourism businesses, creating compelling reasons for travellers to explore Alberta. Established as a crown corporation in 2009, Travel Alberta is mandated to promote the province as a top tourism destination and support the Government of Alberta in the development of tourism policy, advocacy, research, visitor services and product development.

**Tourism HR Canada:** The national organization working to identify and address labour market issues in the Canadian tourism sector.

**Tourism Revenue:** Spending by visitors on Alberta-produced tourism goods and services.



[indigenoustourismalberta.ca](http://indigenoustourismalberta.ca)