



INDIGENOUS
TOURISM ASSOCIATION OF CANADA



FORWARD TOGETHER

A STRATEGIC RECOVERY PLAN FOR THE
INDIGENOUS TOURISM INDUSTRY IN CANADA

2020-24



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We will get through this together

Since the beginning of 2020, COVID-19 has completely altered the global landscape. Within a few short months, everyone has been forced to change aspects of their daily lives in unprecedented ways. And even though the momentum behind the Indigenous tourism industry has been growing with tremendous force over the past decade, we have been hit hard by the global pandemic. We are now collectively facing the challenge of regaining our footing, rebuilding our industry, and strategizing to build resiliency against future impacts.

Closed international borders, grounded airliners, limitations to domestic travel, and loss of consumer confidence have all taken a toll—quickly. It's time to pivot. With Forward Together, our 4-year strategic recovery plan, ITAC will address the nationwide impacts of the COVID-19 crisis and its direct consequences for the Indigenous tourism industry. This plan is a strategic investment of \$50 million over four years to support the Indigenous tourism industry of Canada's immediate response to COVID-19 and its recovery and ongoing resilience.

Our recovery plan will ensure investment in provincial and territorial Indigenous tourism associations and our members through stimulus development grants—starting with a revised investment of an estimated \$14 million directly to eligible Indigenous tourism businesses. ITAC will continue our efforts to seek additional support because we know this situation requires an Indigenous tourism industry solution and we are in a unique position to know what works best for our members.

Our modest yet realistic goal is to respond, recover and rebuild our industry to levels we saw in 2019. By 2024, we will see 40,000 Indigenous people working in our industry again, we will continue to bolster Indigenous tourism businesses across Canada and celebrate 200 market-ready and export-ready businesses, and we will contribute \$1.9 billion in revenue to Canada's gross domestic product (GDP).

The Indigenous Tourism Association of Canada (ITAC) Board and team are optimistic and determined to support our members and partners, as well as to continue to deliver outstanding tourism experiences to guests through the years 2020-24 and beyond.

At a time like this it is important to pause and remember that, as Indigenous Peoples, we have persevered through significant hardships in the past. We are still here today and we will still be here tomorrow. We will overcome this challenge and we will move forward, together.

Thank you,



Keith Henry

President & Chief Executive Officer
Indigenous Tourism Association of Canada



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About the Indigenous Tourism Association of Canada

Since 2014, the Indigenous Tourism Association of Canada (ITAC) has strived to support and strengthen Indigenous tourism experiences throughout Canada. We are now widely recognized as the global leader in Indigenous tourism development and marketing. Our reputation is built upon our successes but also by the strength of our partnerships—at the federal, provincial and territorial levels and also with the Indigenous communities across the country who have chosen to welcome visitors to their lands.

We are proud to support the United Nations World Tourism Organization’s (UNWTO) mandate to promote responsible, sustainable, and universally accessible tourism that is geared towards the achievement of the 2030 Agenda for Sustainable Development. ITAC’s national efforts and strategy aligns well with the United Nations call to action in contributing meaningfully towards the Sustainable Development Goals (SDGs).

Our commitment to improving the socio-economic standing of Indigenous Peoples, as well as to cultural revitalization and environmental stewardship is a priority and guiding principle within our 4 strategic pillars. We have identified the following SDGs that we can actively and directly contribute towards, they are:

- » SDG 1: No Poverty
- » SDG 3: Good Health & Well Being
- » SDG 4: Quality Education
- » SDG 5: Gender Equality
- » SDG 8: Decent Work & Economic Growth
- » SDG 9: Industry, Innovation & Infrastructure
- » SDG 10: Reduced Inequalities
- » SDG 11: Sustainable Cities & Communities
- » SDG 12: Responsible Consumption
- » SDG 14: Life Below Water
- » SDG 15: Life on Land
- » SDG 17: Partnerships for the Goals

Over the past six years, our sector has seen unprecedented growth in Indigenous tourism offerings, resulting in new job creation and an increased contribution to GDP from \$1.4 billion to nearly \$2 billion. Additionally, from 2016 to 2019, ITAC supported a 100% increase in the number of market-ready and export-ready Indigenous tourism businesses in Canada.

Our strategic recovery plan supports the sustainable restoration of Indigenous tourism in Canada as the sector leader in annual growth in jobs, GDP contributions, and the creation of new tourism businesses. We will achieve this through continued delivery of our four pillar approach to business:

Leadership - Increasing positive industry awareness, advocacy and accountability to gain market respect, establish funder confidence, and build member support.

Partnerships - Uniting the Indigenous tourism industry in Canada, bringing together members and key industry organizations to build collaboration and maximize results.

Development - Encouraging product development and investment in Indigenous tourism to ensure the industry remains competitive internationally.

Marketing - Promoting Indigenous tourism and its positive community and cultural impacts with high-value, targeted marketing as well as through research, media and sales efforts.



Impacts of COVID-19 on the Indigenous tourism industry in Canada

Indigenous tourism has been one of the largest employers and economic drivers in Indigenous communities across Canada. Until the impact of COVID-19 hit in early 2020, the Indigenous tourism industry in Canada:

- » Employed 40,000 workers
- » Included 1,900 businesses
- » Provided \$1.9 billion of direct GDP contributions (up from \$1.4 billion in 2015)

Based on the likelihood that the summer 2020 tourism season will be lost, the estimated impact of COVID-19 on the Indigenous tourism industry in Canada is:

- » 32,000 Indigenous tourism employees that have lost their jobs
- » 1,140 Indigenous tourism businesses that will not open in 2020
- » 800 Indigenous tourism businesses that may never open again
- » \$280 million loss in direct GDP per month
- » \$1.4 billion potential loss in Indigenous tourism direct GDP for 2020

The Indigenous Tourism Association of Canada has pivoted quickly to respond to these impacts. In addition to the development of our strategic recovery plan, we have revised our 2020-21 Action Plan to specifically address the impact of COVID-19 and we have provided Indigenous tourism businesses with direct stimulus grants to help them survive financially.



New industry targets for 2024

As the Indigenous tourism industry in Canada recovers from the shock of COVID-19, ITAC has set our sights on moving forward in the most adaptable and sustainable manner possible. We understand that this undertaking will present challenges, both known and unknown, and are prepared to face them head on.

The three main priorities of our strategic recovery plan are:

Ensuring the sustainability of ITAC member businesses across the country

This will be achieved through the creation of a stimulus investment fund for Indigenous tourism operators and an increased emphasis on education and training.

Ensuring the sustainability of the provincial and territorial Indigenous tourism associations

This will be achieved by supporting the ability of provincial and territorial Indigenous tourism associations to maintain their membership and infrastructure.

Ensuring the sustainability of ITAC's national operations

This will be achieved with an emphasis on leadership and through a strengthening of relationships with our industry and government partners.

2024 Targets

COVID-19 has pressed pause on the Indigenous tourism industry's flourishing growth. With the new and emerging realities at play, our revised target for 2024 is to return to our pre-COVID levels:

- » \$1.9 billion of direct GDP contributions
- » 1,900 Indigenous tourism businesses
- » 40,000 Indigenous tourism employees



3 phases of action: Response, Recovery and Resilience

These unprecedented times call for an unprecedented strategic response. Our plan is aligned with the recommendations of the United Nations World Tourism Organization and with Destination Canada's COVID-19 Plan. It mitigates the immediate impact of the crisis, provides stimulus for recovery, and guides the long-term development and resilience of the sector.

Our strategic recovery plan will launch in phases:

- » Phase 1 - **Response** (April 2020 - June 2020)
- » Phase 2 - **Recovery** (July 2020 - March 2021)
- » Phase 3 - **Resilience** (April 2021 - March 2024)

We are facing the unknown. The timelines above are estimates and we will be flexible and adapt to changing circumstances. If a second or third wave of COVID-19 hits, we will react swiftly and if required we can roll back to a phase that is most appropriate for the circumstances.

We understand that there can be no one-size-fits-all approach to our programs. Just as the impact of COVID-19 has impacted regions differently, each province and territory will have its own mandates, procedures, standards and requirements. What's more, Indigenous nations have their own jurisdiction and may specify their own requirements and restrictions based on health and safety concerns. Our strategic recovery plan is flexible and can adapt to this diversity of needs and requirements across the country.

The range of services that Indigenous tourism providers offer spans a multitude of sectors. The health and safety guidelines for these sectors may differ. Accommodation providers will have different requirements from those of retail or culinary or outfitters or tour operators, etc. Our phased approach and adaptable plan takes this into account and will allow us to deliver the right support to our member businesses in each sector of the Indigenous tourism industry in Canada.



Phase 1 - Response

April 2020 - June 2020

Our immediate response to the pandemic was to pause marketing activities and postpone the International Indigenous Tourism Conference. ITAC resources have been redirected towards the financial survival of our member businesses across Canada. We have launched a stimulus grant program that provides non-repayable grants of up to \$25,000 per member. We have also shifted our marketing and development teams to focus on training and resources for our members to prepare them for the recovery phase. Webinars and toolkits covering a range of topics have already been released, and more are on the way.

Objective: To ensure the survival of as many Indigenous tourism businesses as possible, while supporting the provincial and territorial Indigenous tourism associations and preparing for future recovery.

Leadership Activities

- » Securing stimulus funding to support members during the response and recovery phases
- » Advocating for the industry at the federal level to ensure easy and fair access to federal support

Partnership Activities

- » Strengthening existing federal, provincial, territorial and sector partnerships to support the stabilization of the Indigenous tourism industry
- » Maintaining and growing our membership base to ensure that we are representing as many Indigenous tourism businesses as possible
- » Increased financial support for the provincial and territorial Indigenous tourism associations

Development Activities

- » Rescuing Indigenous tourism businesses through stimulus grants
- » Delivering a series of online training workshops to build industry capacity
- » Assisting members with adding online booking functionality to their websites to prepare them for frictionless sales in the recovery phase
- » Creating a national best practices plan for the reopening of Indigenous tourism that includes health and safety guidelines for each sector
- » Redeveloping Project RISE, our accreditation program for Indigenous tourism businesses, to include pandemic response considerations

Marketing Activities

- » Delivering virtual marketing campaigns and public service announcements to keep Indigenous tourism top of mind in the aspirational travel planning of consumers
- » Collaborating with media and public relations partners to monitor sentiment and respond to opportunities as the nation shifts out of lockdown



Phase 2 - Recovery

July 2020 - March 2021

As lockdowns are lifted and restrictions eased, we will switch our focus to restarting the Indigenous tourism industry and promotion of Indigenous destinations that are ready to welcome visitors. We will work with Destination Canada and our provincial and territorial partners to launch domestic marketing campaigns that target Canadians travelling within Canada. We will ensure that our members have the training and resources they need to meet provincial and territorial health and safety requirements. All of ITAC will be working to support the sustainability of the recovery as we prepare for phase 3 and the renewed promotion of our members to international markets.

Objective: To safely restart the Indigenous tourism industry with a focus on domestic travel while continuing to build capacity amongst our membership and providing stimulus support where required.

Leadership Activities

- » Securing stimulus funding to support members during the recovery and resilience phases
- » Advocating for the industry at the federal level to ensure continued access to federal support
- » Delivering a virtual International Indigenous Tourism Conference

Partnership Activities

- » Growing our membership base to ensure that we are representing as many Indigenous tourism businesses as possible
- » Strengthening and expanding federal, provincial, territorial and sector partnerships to support the recovery of the Indigenous tourism industry

Development Activities

- » Launching an Indigenous Tourism Innovation Lab to help future-proof our member businesses
- » Implementing Project RISE, our accreditation program for Indigenous tourism businesses
- » Implementing and sharing provincial and territorial reopening and response plans
- » Creating a strategy to recover jobs and increase Indigenous engagement in the tourism industry
- » Creating provincial, territorial and community readiness toolkits
- » Creating a directory of online training resources for members
- » Developing the Indigenous Culinary Ambassador network

Marketing Activities

- » Delivering virtual fam tours and press trips for travel trade and media
- » Creating nationwide campaigns on key platforms such as Expedia and Airbnb
- » Publishing a digital version of Nations magazine
- » Creating niche content to promote the various sectors of the industry
- » Collaborating with the travel trade to promote Indigenous tourism packages in key markets
- » Collaborating with Destination Canada and provincial and territorial partners on the launch of a domestic marketing campaign targeting travel within Canada



Phase 3 - Resilience

April 2021 - March 2024

When life begins to return to normal and international travel restrictions are lifted, ITAC will lead the Indigenous tourism Industry into phase 3 of our strategic recovery plan: resilience. Our marketing team will expand its efforts to include the promotion of our members in key international markets. This work will be done in partnership with Destination Canada and will build upon our ongoing domestic marketing campaigns conducted in collaboration with our provincial and territorial partners. ITAC will continue preparing our members for future emergencies with an expanding collection of toolkits and online training. We will be focused on meeting our 2024 targets as we rebuild a stronger, more sustainable Indigenous tourism industry in Canada.

Objective: To reach our 2024 targets while ensuring the long term sustainability of our industry and strengthening its ability to handle future pandemics or other disasters.

Leadership Activities

- » Safely hosting an in-person International Indigenous Tourism Conference
- » Advocating for the industry at the federal level to ensure that the Indigenous tourism industry is well supported during the resilience phase
- » Expanding participation and representation in national level organizations

Partnership Activities

- » Growing our membership base across Canada
- » Strengthening and expanding federal, provincial, territorial and sector partnerships to support the resilience of the Indigenous tourism industry

Development Activities

- » Delivering micro-grants to help businesses meet market-ready and export-ready standards
- » Implementing our job recovery strategy
- » Maintaining Project RISE as an effective national accreditation program
- » Continue supporting provincial and territorial health and safety plans in the “new normal”
- » Collaborating with educational institutions to deliver Indigenous tourism and culinary programs

Marketing Activities

- » Organizing and managing sales missions and roadshows in key markets
- » Participating at Rendez-vous Canada and other trade and media events
- » Implementing domestic and international co-op marketing programs
- » Delivering fam trips for international media and travel trade
- » Delivering Influencer and story pitching campaigns
- » Creating rich media content through media and industry partnerships
- » Creating collections of beautiful digital assets to support our marketing campaigns



Required investment

ITAC has achieved unprecedented results since 2014. This success would not have been possible without the ongoing support of our partners in the Government of Canada. We look forward to continuing to strengthen this relationship as we move forward together. To achieve our 2024 targets for the Indigenous tourism industry in Canada, our four-year recovery plan requires a \$50 million investment over four years.

	2020-21		2021-22	2022-23	2023-24	
	RESPONSE	RECOVERY	COMBINED	RESILIENCE	RESILIENCE	RESILIENCE
Leadership	620,000	2,480,000	3,100,000	2,500,000	2,200,000	2,200,000
Partnership	620,000	2,480,000	3,100,000	2,500,000	2,200,000	2,200,000
Development	1,395,000	5,580,000	6,975,000	4,000,000	3,080,000	2,750,000
Marketing	465,000	1,860,000	2,325,000	3,500,000	3,520,000	3,850,000
	3,100,000	12,400,000	15,500,000	12,500,000	11,000,000	11,000,000

Total four-year investment of **\$50 million**



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