



INDIGENOUS
TOURISM ASSOCIATION OF CANADA

MID-TERM REPORT

Progress Towards the
2021-22 Action Plan
Key Performance Indicators



TABLE OF CONTENTS

Message from ITAC President & CEO	5
A letter from the Chair of the Board of Directors	7
State of our Industry - Mid Term Review	9
Key Objectives: Stabilizing our Member Businesses, Associations, and National Operations	13
Stabilizing our Member Businesses	15
Stabilizing the Provincial and Territorial Indigenous Tourism Associations	19
Stabilizing ITAC's National Operations	25
Budget Year to Date	27
Schedule of Expenses	31



In this report, ITAC is proud to feature images of our members from across the country. To learn more about our members and to see more images, please visit [DestinationIndigenous.ca](https://www.destinationindigenous.ca).

FRONT COVER: PAINTED WARRIORS • AB

BACK COVER: KNIGHT INLET LODGE • BC



Message from ITAC President & CEO

As we approach the historic impact from the COVID-19 pandemic these past two years, Indigenous tourism is starting to witness small steps of recovery. Prior to the pandemic, Indigenous tourism capitalized on more than 30 years of marketing and development leading to our sector's most successful year ever in 2019. While the pandemic has greatly affected that trajectory, the Indigenous Tourism Association of Canada (ITAC) believes that we can return to these targets of \$1.9 billion of direct GDP contributions, 1,900 Indigenous tourism businesses and more than 40,000 Indigenous tourism employees by 2024. Indigenous tourism experiences fit uniquely well with domestic and international consumer demands arising out of the COVID-19 pandemic and Canada's desire for Indigenous reconciliation. We're working to create an updated industry-wide strategy from 2022-2025 to meet these consumer demands quickly while this opportunity is at its peak. This means bringing together all efforts, minds and levels of government to ideate cohesive solutions.

Across society, we have seen attitudinal shifts that have moved closer to the perceived core values of Indigenous culture. Escapism is being redefined away from hectic, stressed, overscheduled, exhausted to embracing a slower, more mindful pace of life with loved ones appreciating nature, simplicity, spirituality and soulfulness. The ideal time is now to leverage these shifts by supporting and showcasing Indigenous tourism experiences. Attention and funding both federally and provincially can have a substantial impact to stabilize and attract meaningful awareness, interest and drive sales. ITAC has led new meetings in the fall of 2021 to raise awareness to support the needs of ITAC members, Provincial/Territorial Partners, and ITAC operations. Therefore it was particularly heartwarming to see so many partners participating in our series of three (3) Forging the Future workshops in Ottawa, with Destination Canada, Westjet, Tourism HR Canada, Parks Canada, Via Rail, the Hotel Association of Canada, Air Canada, ACOA and ISED among the many in attendance. There is a shared understanding of the invaluable role Indigenous tourism plays in our economy and that only by working together can we pull through and create a sustainable industry that is resilient to future crises.

The time is now to stabilize and grow Indigenous tourism in Canada and we are working tirelessly to champion, socialize and assist members in activating the new COVID-19 strategic plan to more effectively drive travellers to their business. We're helping to build meaningful awareness and create positioning that is consistent, unified and crystalizes what Indigenous tourism and cultural experiences are. We are coming together as Indigenous Peoples to not only fight and survive but to come out of this hardship stronger than ever and I'm excited about the opportunity that stands before us. We are overcoming this challenge and we will continue to move forward together.

Sincerely,



Keith Henry
President & CEO
Indigenous Tourism Association of Canada





A letter from the Chair of the Board of Directors

It's no secret that the COVID-19 pandemic has been hard and we know from having lived through it, that the Indigenous tourism industry has been especially hard hit. After the first year of the pandemic, the Indigenous tourism industry went from having seen its best year ever in terms of GDP contribution and employment, to seeing devastating job and revenue losses across the country.

But through all of this, Indigenous Peoples, Indigenous businesses and Indigenous tourism have remained resilient. As a board, we have been incredibly proud to see our team pulling through the third and fourth waves of COVID. We're incredibly thankful for our team that has been working tirelessly to create an industry-wide strategy to drive our entire industry forward quickly.

We've seen through the past two years a societal shift in values, a shift that has moved consumers closer to the core values of Indigenous culture. We're seeing tourists more interested in exploring the land they inhabit in addition to embracing a slower, more mindful pace of life grounded in nature and spirituality.

It is now time for Indigenous tourism to rebuild, grow and flourish. Our team is working to bring together all efforts and levels of government to create cohesive solutions for our industry and it's these efforts that have contributed to ensuring our more than 1,900 businesses have resources to not only survive this disruption but to come out of it stronger than ever. We also believe it is time for us to pull together more than ever.

Thank you to everyone that has worked hard to support our members across the country. In particular, I would like to thank the ITAC team for their passion, optimism and commitment to ensuring Indigenous tourism comes out of this pandemic stronger than ever. It is an honour to work beside you.

Sincerely,



Brenda Holder
Board Chair
Indigenous Tourism Association of Canada





STATE OF OUR INDUSTRY - MID TERM REVIEW

Prior to COVID-19, the growing Indigenous tourism sector in Canada provided a globally recognized competitive advantage for the country's tourism industry. It also brought economic growth and stability to at-risk Indigenous communities, providing a successful Indigenous-led model where previous government programs had failed. As a result, Indigenous tourism has contributed an approximate \$1.9 billion to Canada's GDP. More importantly, the industry provides a portal into the culture and heritage of Indigenous people across Canada, and an opportunity to reconcile and preserve Indigenous Peoples' cultures.

Tourism spending in Canada increased 4.2% in the second quarter. The drive for this increase in spending was mostly accommodation services and food and beverage services. Overall, tourism spending in Canada in the second quarter was 55.4% lower than the pre-pandemic levels in the fourth quarter of 2019.

While the economy-wide GDP declined 0.3 % in the second quarter, tourism GDP rose 4.0%. Additionally, employment attributable to tourism increased 1.0% in the second quarter following a 4.7% decline in the first quarter.

Tourism spending in Canada by Canadians rose 5.4% in the second quarter, following a 2.9% decline in the previous quarter. Unsurprisingly, spending by international visitors remains at historic lows, with domestic tourism accounting for 97.0% of total tourism spending.

Prior to the 2019 pandemic, Indigenous tourism employed 38.9K employees and brought in an estimated \$1.9 billion in direct GDP. During the peak of the pandemic in 2020, Indigenous tourism dropped to 10.6K employees and contributed only \$580 million in direct GDP. So far in 2021, Indigenous tourism employed 19.7K and provided an estimated \$858 million in direct GDP.





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.

ITAC's focus continues to be ensuring the sustainability of ITAC member businesses across the country, ensuring the sustainability of the provincial and territorial Indigenous tourism associations and ensuring the sustainability of ITAC's national operations. COVID-19 has pressed pause on the Indigenous tourism industry's flourishing growth and with this new reality, our revised target for 2024 is to return to our pre-COVID levels of GDP contribution and employment.

Today, we are working in conjunction with our tourism industry partners to ensure our voices are heard and the importance of a thriving, well-funded Indigenous tourism industry is not ignored. ITAC will continue to be a leader that works to stabilize, recover and ultimately regain the lost ground for which we have worked so hard.





**KEY OBJECTIVES:
STABILIZING
OUR MEMBER
BUSINESSES,
ASSOCIATIONS,
AND NATIONAL
OPERATIONS**



THE BEAR THE FISH THE ROOT & THE BERRY • BC

Stabilizing our Member Businesses

MARKETING

Online Marketing Presence and Key Sales Assessment

- Review and support member's online marketing presence, key sales platforms and partnerships

100% Completed

The marketing team added 50 packages online to the Destination Indigenous Website to support the sales of Indigenous operators as well as supported operators to access a Purchasable Management System (PMS) and created a webinar on how to sell online. A new partnership was developed with Checkfront as well as with Meridian reservation system. ITAC has also been an important business within the Expedia Canada hub, as well as created a new Indigenous category worldwide with Trip Advisor.

Domestic Awareness Campaign

- Drive a 365-day domestic awareness campaign to encourage domestic travellers to fall in love with and book Indigenous tourism experiences across Canada

75% Completed

ITAC launched a 2M\$ campaign called the Original Original for June 21st. Currently the campaign is on-going with great results, and sales to our operators.

DEVELOPMENT

Grants

- Provide emergency stimulus grant support for Indigenous tourism businesses still in operation to maintain infrastructure, pivot operations and start recovery

*NF

This was unfunded in Fiscal Year 2021-22



Business Support Services

- ➔ Provide members with one-on-one assistance in identifying and accessing federal relief initiatives and offer supports for mental health and industry relief. Examples may include support for: financial literacy and accounting, human resources, legal and administration

*NF

This was unfunded in Fiscal Year 2021-22 however ITAC staff team is working on an as needed basis to support members in accessing federal relief.

Project Rise

- ➔ Fully implement Project Rise to support the recovery and improvement of Indigenous tourism operators through aligned resources focused on development and marketing needs

25% Completed

Project Rise will be implemented in Q3 for pilot program and fully implemented in Q4.

Industry Focused Capacity Support

- ➔ Provide businesses with industry focused webinars

75% Completed

Administered 9 webinars to the industry.

PARTNERSHIP

Strengthening Indigenous Tourism in Canada Through Advocacy

- ➔ Being the voice of members with provincial, territorial and federal partners

50% Completed

LEADERSHIP

Business Help Line

- ➔ Assist members with business survival support and mental health

*NF

Funding not received via third wave funding request



ASKI HOLISTIC ADVENTURES
RECONNECT WITH NATURE

Ongoing Member Communication

- Continue to share and interact with members through webinars, training opportunities and important funding information while adapting to their ever-changing needs

50% Completed

Stabilizing the Provincial and Territorial Indigenous Tourism Associations

MARKETING

Domestic Campaign

- Support and drive targeted domestic efforts with our provincial and territorial partners through coordinated and cooperative sales and marketing initiatives

75% Completed

ITAC has worked with Provincial and Territorial partners to promote, capture and sell Indigenous experiences. We have launched coordinated investments in Quebec, NL, NWT, Nunavut, Yukon, Manitoba, PEI, with more to come.

DEVELOPMENT

Co-op Development Project

- Support development projects with provincial and territorial partners to meet the needs of member businesses

*NF

ITAC aligned with MOU partners to invest in product development. Includes Travel Manitoba, Tourism Saskatchewan, WestJet and investments through Indigenous provincial territorial associations.



Governance Stabilization

- ➔ Provide core funding to 9 ITAC partner Indigenous tourism associations

50% Completed

Funding intake complete in Q2 (delayed due to funding commitments); fully implemented through standardized intake, contribution agreements to deliver program up to date to midterm.

- ➔ Build organizational capacity of associations through tools, resources and best practices

50% Completed

Research and Capacity Support

- ➔ Initiate a new Conference Board of Canada research project to ascertain the current impact of the pandemic in each province and territory

100% Completed

Conference Board of Canada research completed to determine the impact of COVID-19 through to 2021. Additional research is being completed to determine the potential economic impact, and lost investments if Indigenous tourism is not supported. Will be completed in Q3.

ICAN Stabilization

- ➔ Support core capacity of ICAN to align with ITAC funding priorities

25% Completed

PARTNERSHIP

Core Funding

- ➔ Provide annual funding to support the operations of provincial and territorial associations

50% Completed

Continued base line funding for established Provincial and Territorial associations.



Capacity Development

- ➔ Work with provincial and territorial associations to grow financial and business acumen

75% Completed

Supported multiple associations with funding applications + letters of support for TRF and other federal funding.

Increase Partnerships Between Indigenous and Non-Indigenous Tourism Associations

- ➔ Support provincial and territorial associations by introducing them to their provincial partners

75% Completed

Continued work with MITA and establishing this association as well as support for other Associations with direct support from Non-Indigenous PMO's.

LEADERSHIP

Provide a Membership Framework for Consistent Membership Data Across all Provinces and Territories

- ➔ Provide provincial and territorial associations with best practices and standardized data formats

100% Completed

Updated corporate website support with ITAC approved National guidelines, and corporate policies for associations and members to utilize.

Provincial and Territorial Meetings

- ➔ Maintain provincial and territorial planning table to share best practices and industry insights

50% Completed

Hosted virtual meetings - 6 meetings since April 1, 2021.



UNDER THE STUMP • NL

Stabilizing ITAC's National Operations

MARKETING

COVID-Safe Initiative

- Create a series of videos highlighting health and safety measures to reassure travellers that Indigenous tourism experiences are safe

85% Completed

ITAC launched 2 videos highlighting the reopening of our businesses. Although the videos were not specifically targeted at safety measures, it was highlighted within the videos. ITAC also added on its online map, the businesses status of each market, and export-ready experiences so travelers will know if it is open or not. ITAC has also developed a health and safety guideline, as well as provided signage and templates to their members.

Indigenous Community Sentiment Support Campaign

- Create a series of videos to showcase the Indigenous communities who are currently welcoming visitors

30% Completed

4 videos have received the go ahead and are planned before the end of the fiscal. Quote has been approved and Indigenous suppliers notified. One extra video will be created with Westjet, and one outfitter video has been fully completed.

DEVELOPMENT

Data Tracking and Management

- Implement an organization-wide system to track and manage data from operators, provincial and territorial partners, and ITAC department activities

25% Completed

This was unfunded in Fiscal Year 2021-22 however initial assessment of requirements has been completed should funding be realised.





PARTNERSHIP

MOU Commitments

- ➔ Manage provincial, territorial, corporate and federal partner agreements to satisfy all compliance requirements

90% Completed

MOU's continue to guide partnerships between ITAC and PT partners.

LEADERSHIP

Maintain ITAC's Reputation

- ➔ Have ITAC recognized as the global leader for Indigenous tourism

100% Completed

Participated at the MITA International Conference in October, and partner on Indigenous Collaborative of the Americas.

- ➔ Recruitment of Director of International Projects

75% Completed

ITAC continues international work to further Indigenous Tourism Guidelines to other countries. Position not filled due to COVID.

Research and Data

- ➔ Generate research providing data and analytics that sustains Indigenous tourism

100% Completed

Completed research projects with Tourism HR Canada, Insignia, and Conference Board of Canada and Economic Impact and Tourism Investment Research with iTotem.



JOHNNY AND BILLY CAIN OUTFITTERS • QC

BUDGET YEAR TO DATE

Income Statement Mid Term Ended 30 September 2021

Revenues

Contributions	4,623,483
Fees and sponsorship	-
Membership fees	396
Other and Miscellaneous	92,724
TOTAL REVENUES	\$4,716,603

Expenses (see schedule)

Administration	773,154
Leadership and partnerships	221,410
Marketing and sales	897,075
Development	456,274
TOTAL EXPENSES	\$2,347,913

Excess (deficiency) of revenue over expenses	\$2,368,691
Net assets (deficit) at the beginning of year	\$778
Net assets (deficit) at end of September 2021	\$2,369,469



SCHEDULE OF EXPENSES

**Mid Term ended
30 September 2021**

General and Administrative

Administration - Main Office	\$470,698
Annual General Meeting	-
Board Expenses and Travel	63,496
Membership Support	2,935
Office Supplies and Expenses	96,240
Professional Fees	55,277
Rent	49,045
Travel - Staff	35,464
TOTAL ADMINISTRATION	\$773,154

Leadership and Partnerships

Corporate Communications & Research	74,649
Development and Strategic Planning	53,168
Event Sponsorship	-
Indigenous Culinary Tourism	39,031
Partnership Initiatives	54,563
TOTAL LEADERSHIP AND PARTNERSHIP	\$221,410





Marketing and Sales

Administration - Marketing and Sales	\$164,381
Content Development	4,000
Creative Design and Production	21,462
Marketing and Sales	40,164
Media Relations	50,534
On-line Marketing	44,381
Partnership Program	512,105
Trade Shows and Conferences	60,047
TOTAL MARKETING AND SALES	\$897,075

Development

Administration - Development	\$179,168
Development Support Projects	84,871
Funds Support	192,235
National Indigenous Tourism Conference	-
International Indigenous Tourism Conference	-
TOTAL DEVELOPMENT	\$456,274

TOTAL EXPENSES	\$2,347,913
-----------------------	--------------------



INDIGENOUS
TOURISM ASSOCIATION OF CANADA

IndigenousTourism.ca *DestinationIndigenous.ca*

1-888-803-4822 | Info@IndigenousTourism.ca | 8th Floor, 333 Seymour Street, Vancouver, BC, V6B 5A7