Indigenous Tourism Ontario
Investing in our Future
2020
Indigenous Tourism Ontario - 2020 Strategy

One Vision
- We will authentically share our culture with the world by engaging in responsible community-based tourism. We will support and develop tourism initiatives that respect our values, preserve our culture, and protect our way of life for the betterment of our nation’s people, environment and economy.

ITO will be strategic in reaching our goals while creating 1,160 new jobs with over $12 billion in total output and $6.7 billion in GDP to Ontario’s economy by 2020.

Our 2020 Strategic Goals:
1. Developing Operational Sustainability & Brand Integrity
2. Building Capacity & Increasing Economic Opportunities
3. Marketing & Branding Authentic Products & Services
4. Providing Support for Communities & Entrepreneurs

Our 2020 Vision is built on stakeholders who have overwhelmingly supported a single organization dedicated to building Indigenous tourism in Ontario. Our collective vision supports an organization that will responsibly develop, market and grow Ontario’s Indigenous tourism industry with values and integrity. We will ensure our growth adheres to responsible tourism guidelines that promote sustainability, environmental stewardship, innovation and technology.

Our Guiding Principles will ensure responsible growth by: gaining organizational sustainability, utilizing an innovative grassroots approach, attracting investments & developing partnerships and implementing ITO’s 2020 key initiatives.

Our Mission is to assist indigenous communities and entrepreneurs with programs that build capacity to produce high quality products and services. Our success will be guided by the positive impact on our people, the environment and the economy. For our welcomed visitors and tourists we will ensure that our products and services provide a meaningful and memorable Indigenous experience.

Our Chiefs, governments, partners and investors recognize that tourism provides both social and economic growth for our people. Our communities and entrepreneurs recognize tourism as a way to preserve our culture and keep our history alive; ITO recognizes that the industry relies on our community, entrepreneurs, educators and youth for sustainability; therefore, we are committed to supporting our communities and individuals through education, training and investment for tourism development in Ontario.

Indigenous Tourism Ontario 2020 is based on making our province an authentic tourism destination that will attract visitors from within Canada and abroad based on a brand of market ready Indigenous tourism products and services.

To date, we have generated more revenue (30% nationally) than any other province, yet we have done this with limited resources and inconsistent support. It’s time to make Indigenous tourism a priority in Ontario by launching and supporting an independent organization that is completely dedicated to positively reshaping our province’s future for Indigenous tourism.

Kevin Eshkawkogan
Indigenous Tourism Ontario (ITO)
Launching ITO

2015 is the year in which our plan launches Indigenous Tourism Ontario as an independent registered corporation. This is a critical step in establishing an organization that will ultimately support, recognize and market indigenous tourism businesses and communities in Ontario. To date this has been spearheaded with a limited budget and highly under-resourced efforts.

These commendable efforts have been driven by the Great Spirit Circle Trail Inc. (GSCT), a non-profit organization that includes eight First Nation communities within the Manitoulin-Sagamok region in Northern Ontario. GSCT’s mandate is to promote and assist Indigenous involvement in the tourism industry. GSCT has recently undertaken a provincial stakeholder consultation process to allow key players to get involved by having their voices heard to help launch the ITO this year. The process has been led by Kevin Eshkawkogan, one of four nominees for the 2015 TIAO Tourism Champion of the Year.

GSCT has provided the framework for transitioning the ITO into an independent organization. GSCT’s current mandate includes assisting with the development of ITO. GSCT recognizes the need for proper resources and leadership to support the start-up and implementation of the ITO.

In researching the best practices of our Indigenous Tourism Association of Canada (ITAC) members, we note that success was achieved by having fully staffed organizations that have partnerships and governments supporting the required resources to truly grow indigenous tourism. Organizations such as Aboriginal Tourism BC (ATBC) and the Cree Outfitting and Tourism Association (COTA) have excelled with membership and higher tourism receipts in indigenous communities because of their strong financial and leadership support.

A regional and provincial approach to Indigenous tourism development will benefit the tourism industry, indigenous individuals, and communities respectively. ITO will complement the province’s Regional Tourism Organizations (RTO’s) who provide regional leadership and support a more coordinated and collaborative approach that maximizes resources, encourages strategic planning and investment, and results in stronger marketing with better reach. With over $40 million invested annually with the RTO’s, ITO would benefit from the province’s goal to increase tourism receipts and marketing reach.

GSCT currently manages all of ITO’s operations with minimal resources. ITO will hire staff and officially start operating a separate entity apart from GSCT. During this transition period, GSCT and ITO will work collaboratively to ensure a smooth transition and that ITO’s goals and initiatives are aligned with the operational budget.

The following key initiatives outline the immediate investment of $1,044,075 that is required to successfully start up the ITO organization in 2015:

<table>
<thead>
<tr>
<th>Key Initiatives</th>
<th>Immediate</th>
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<tr>
<td>Transition and Launch of ITO Operation</td>
<td>376,075</td>
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<tr>
<td>Focus on ATO Rebrand &amp; New Marketing Efforts</td>
<td>253,000</td>
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<tr>
<td>Promote and Deliver Capacity Building Programs and Services</td>
<td>150,000</td>
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<tr>
<td>Implement and Develop the Authentic Indigenous Moments Program (AIM)</td>
<td>125,000</td>
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<td>Develop Regional and Provincial Partnerships</td>
<td>140,000</td>
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<tr>
<td>Total</td>
<td>$1,044,075</td>
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Quote

“The Operational Budget has been updated to align with ITO’s 2020 Strategy which also is aligned with ITAC’s Implementation Strategy”

- Kevin Eshkawkogan
Indigenous Tourism Ontario - 2020 Strategy

Indigenous Perspective

Provincial Benchmark
ITAC has reported the overall Tourism Output is $1.7 billion, which is 7% of Ontario’s total Tourism Output.\(^1\)
Ontario visits are forecast to grow an average of 1.6% per year from 2014 to 2018 while visitor spending will increase by an average of 6.4% per year.\(^2\)
With the expected growth, Indigenous tourism will generate over $12 billion in output and $6.7 billion of GDP into our economy over the next 5 years.\(^3\)

ITO’s Economic Impact Baseline
We collected data from 68 businesses (14%) Ontario’s registered Indigenous businesses across all sectors throughout Ontario, which included 32 individually owned and 36 community owned.
These 68 businesses contributed $116 million to our economy representing 12% of Ontario total tourism output, while generating 1,595 jobs.\(^4\)
By 2020 it is estimated 15,204 FTE jobs will be directly related to indigenous tourism.

Of the 94 businesses contacted:
• 41% are deemed ‘market ready’
• 24% are deemed ‘almost market ready’
• 34% are deemed ‘not market ready’
38% of the communities contacted were already involved with tourism development

1 National Aboriginal Tourism Research Project 2015 - Economic Impact of Aboriginal Tourism in Canada
3 ITO projections based on ITAC’s 2014 projections
4 Ontario’s Tourism Regional Economic Impact Model (TREIM)

Growth increase of tourism output $629M over 5 years
1,160 new jobs over 5 years
Increased visits 337,000 over 5 years

Capturing 7% of Ontario’s Indigenous Tourism Output

Visitors per Sector using a baseline of 68 businesses

<table>
<thead>
<tr>
<th>Sector</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
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</thead>
<tbody>
<tr>
<td>Attractions</td>
<td>5%</td>
<td>7%</td>
<td>8%</td>
<td>4%</td>
<td>15%</td>
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<tr>
<td>Resort/Casino</td>
<td>5%</td>
<td>5%</td>
<td>15%</td>
<td>16%</td>
<td>28%</td>
</tr>
<tr>
<td>Accommodations</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Outdoor Adventure</td>
<td>7%</td>
<td>5%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>5%</td>
<td>5%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Festivals &amp; Events</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>4%</td>
<td>4%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
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<tr>
<td>Transportation</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
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<td>15%</td>
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</table>
The following goals were at the forefront of the stakeholder engagement process, which lead to the development of ITO’s 5 Key Initiatives:

1. Enhance Indigenous tourism across the province
2. Support regional and provincial collaboration and coordination of Indigenous tourism.
3. Encourage engagement of industry partners to support our efforts
4. Support a coordinated approach that aligns planning, product development, investment attraction and workforce development in Ontario’s regions
5. Provide a solid foundation for Indigenous tourism businesses to positively impact Ontario’s economy

The majority of the tourism partners are willing to assist ITO with marketing and promotions, play an advisory role, and assist with developing tourism packages.

ITO needs to formally align with partners & and their efforts i.e. Art & Cultural Strategy, ITAC MTSC Framework.

"Partnership collaboration by providing content to promote existing cultural events and experiences, creating partnerships with Tribal Councils to promote opportunities for youth, and partnering to help improve still and video image banks of existing cultural experiences and events.”

Industry Partner

1. Transition & Launch of ITO Operation
   - Of the 94 businesses contacted:
     - 41% are deemed ‘market ready’
     - 24% are deemed ‘almost market ready’
     - 34% are deemed ‘not market ready’
   - 38% of the communities contacted were already involved with tourism development

2. ITO Rebrand & New Marketing
   - 36% of Tourism Businesses need support with Marketing & Branding
   - 38% of communities either lacked well-developed websites or their sites were not user-friendly. 12% of the communities did not have their own website.

3. Capacity Building Programs & Services
   - 48% of Tourism Businesses need support with staff and management training

4. AIM Program
   - Using technology to showcase our culture and help our individual guiding businesses set up, with minimal effort is brilliant
   - Only 15% of the communities that have developed tourism offer more than 3 diversified products

5. Regional & Provincial Partnerships
   - The majority of the tourism partners are willing to assist ITO with marketing and promotions, play an advisory role, and assist with developing tourism packages.

Innovate Ontario (ITO) contacted 130 communities in Ontario in an effort to hear the Indigenous voices of tourism. The engagement strategy focused on hearing from the Indigenous communities, businesses and partners on how to enhance and grow the Indigenous tourism industry.

"Our province needs unified voice for Indigenous tourism. We need an organization that represents us and helps us get on the international stage.”

Community Leader

"We need programs industry training programs for our staff and management.”

Business Owner

"There is the opportunity for the integration of Indigenous Experiential Tourism with some of our traditional businesses; as an example, First Nation Guides and story telling at remote tourism lodges.”

Community Business

"We have been growing partnerships with the Indigenous Groups, but still there is much potential for future partnerships.”

Industry Partner
Indigenous Tourism Ontario - 2020 Strategy

A Strong Identity

Strong Brand - Strong Identity

ITO will be rolling out the first ever indigenous digital technology platform: Authentic Indigenous Moments Application. In addition, ITO will be going through a second phase of rebranding that will present world-class design and interactive digital media presence. It’s important to set the bar high and produce something that puts Indigenous products and services on the international stage. Logo’s change throughout the year to represent each season.

Develop ITO Brand – Rebrand Phase 2

The development of Phase 2 of the rebrand will build on the initial concept but expand upon it and further refine the story of Indigenous Tourism in Ontario. We will also be renaming ITO since there is a growing demand in the international markets for cultural and Indigenous tourism, it is recommended to replace "Aboriginal" with "Indigenous".

Phase 2 Rebranding Activities

1. The first ever online indigenous portal that directly connects tourists to "authentic guides", referred to as ITO’s Authentic Indigenous Moments (AIM).
2. Populate and modify Phase 1 of our interactive web platform to promote all sectors of tourism and house membership activities.
3. Hiring a full time Digital Marketing Manager to build, maintain and evaluate social media and AIM. This will include building the brand as well as analytics to help improve conversions.
4. Video & Professional Photography – High resolution photography depicting the thematic routes and regions along with a series of video vignettes will be created to show a snapshot of each region highlighting their historical, cultural, and natural features as well as the different tourism activities available.
5. Geographic Branding & Thematic Routes - Geographic branding and tourism theme routes link businesses and communities within a given geographic area under a unified theme, creating a unique geographic brand image and clear identity for each region within Ontario.
6. Supporting ITAC’s 5 year plan, Ontario Trade Missions, Shows & Travel Trade; ITO will incorporate trade shows and travel trade events as well as supporting ITAC 2015 - 5 year plan into our overall marketing strategy & budget.
7. ITO will work collaboratively with its regional partners, RTO’s, and members for marketing reach and trade shows to minimize duplication of efforts, maximize exposure and ensure cost effectiveness. ITO will work with OTMPC’s Marketing Strategy 2014/15 as well as regional partners. Interactive Kiosks – Develop content and import vignettes, regional highlights, and AIM for Ontario Travel Information Centres (OTICs) who captured over 900,000 visitors this past year.

What industry had to say

Qualitatively, ‘Aboriginal’ and ‘aborigine’ are linked very strongly with Australia and New Zealand because these are the terms used to refer to native inhabitants of those areas, and have been for decades. The connection to Oceania has been so powerfully imprinted that, for most, Aboriginal most often means native of Australia or New Zealand, instead of a more general synonym for native.

CTC – Indigenous tourism opportunities for Canada
Indigenous Tourism Ontario - 2020 Strategy

Linking our Culture with Technology

The use of an interactive web platform is vital to the success of any business. The tourism industry is changing rapidly based on demand, unique offerings, accessibility, and market awareness, and there is a shift in tourist demands towards more ethical and environmentally friendly consumerism. Consumers are looking for high quality and unspoiled scenery, peaceful environments, and personal attention that typically only small-scale, locally owned businesses can offer. Authentic, experiential tourism is being encouraged and promoted by the Canadian Tourism Commission and is a growing trend throughout the world.

Digitally Responsible Innovation

ITO will utilize the latest innovations and technologies to ensure indigenous tourism cultural products connect with tourists. Tourists will have the opportunity to identify and connect with a choice of cultural guides, each of whom has a unique and personal story to share. By using technology to connect cultural guides with tourists, there is an amazing opportunity to attract business through a single window that creates a relationship between buyer and seller.

‘Authentic Indigenous Moments’

Having a mobile website with social media integration is the standard operating procedure in tourism today; however if Indigenous tourism in Ontario is to attract and provide more visitors with superior service, we need to employ a new and innovative approach.

ITO has planned for an online portal that connects culturally sensitive guides to tourists referred to as ITO’s Authentic Indigenous Moments (AIM). AIM produces and delivers the very essence of what the new type of tourist is looking for when it comes to a meaningful and unforgettable cultural experience.

We will promote our experiences through a centralized ‘consumer rated’ window that is accessible on both Apple and Android devices. This platform will set ITO up for sustainability while providing the opportunity for entrepreneurs and businesses to thrive through a central distribution of authentic products and services. It is here where tourists will have an incredible connection with our cultural entrepreneurs. Let’s take AIM on the future of indigenous tourism and do something that makes a difference to preserving our culture and helps us share our story with the world.

AIM on the future

Supporting Comments from ITO Workshop Participant:

‘Having seen the AIM concept it provided me with a hope that I can start tourism organically by doing something I love – my culture and providing for my family without taking a huge business start-up risk’

Technology permeates almost every aspect of our lives, and when utilized properly can offer an ideal medium to preserve traditional knowledge, teach the community’s youth, and share select information with the world. Adding social proof via customer testimonials and real-time rating systems is required to get the attention of shoppers and ultimately convert them to buyers.

For AIM to be digitally successful it will require a user-friendly, highly accessible single access window that provides:

- better mobile functionality allowing for minimal purchasing effort
- better booking and communication integration
- superior end of sale trust between user and provider
- a clear and compelling value proposition

The technology will encourage online conversions with a strong marketing and revenue position.

1. AIM was developed by CES’s Indigenous MomentsTM (IM) model.
Reaching our Goals

In order to reach our goals as an organization we will need to be clear on our mandate and ensure our activities are monitored, maintained and measured by our board, partners, stakeholders and customers alike. In order to do this we need to:
1. Gain full support and funding for ITO’s Critical Path
2. Develop tourism organically;
3. Promote community-based tourism initiatives;
4. Support local cultural entrepreneurs;
5. Provide local revenue generating opportunities;
6. Use technology for growth;
7. Increase brand and market share for sustainability.

Managing our Plan

ITO 2020 has used a ‘grow as you go’ model supporting the function and structure for the sustainable evolution of our organization. We are using the following Pando Terra™ Elements to manage our plan:
1. Training and Human Resource Development
2. Educational Links & Transfer of Knowledge
3. Linking Traditions with Technology
4. Protection of Environment, Heritage & Culture
5. Opportunities for Local Businesses
6. Employment Opportunities
7. Community Infrastructure

Conditions for Success

Measuring our Success

1. 50 community-based training programs delivered
2. 250 trained individuals
3. 20 new entrepreneurs/businesses
4. 25 internationally ready businesses
5. 150 new products
6. 500 bookings through ITO
7. 250 ITO members
8. Compliance with ITO business plan KPIs

Monitoring our Success

1. Enhance, increase and promote Indigenous tourism across the province
2. Support regional and provincial collaboration and coordination of Indigenous tourism
3. Encourage engagement of industry partners to broaden the financial base and extend market share
4. Provide a coordinated and strategic approach that aligns planning, product development, investment attraction and skillful development in all regions of Ontario and Canada (ITAC)
Sustainability is about finding balance between the natural world, our culture, and the economic world. The triple bottom line balances social (culture), environmental (ecology), and financial (economic) sustainability.

Pando Terra™ is a development model that uses indigenous ways to promote sustainability. Using Pando Terra™ for ITO will ensure a balance between investment and development opportunities, the land and environment, and each involved community’s socio-economic growth, resulting in a positive triple bottom line.

The tourism sector provides indigenous communities with an opportunity to grow our province’s economy without negatively impacting our natural resources and way of life. In a time of slowed resource extraction and a strong US dollar, our province needs to diversify its GDP by building on a sector that can prosper in these times.

New businesses can excel in an environment of encouragement and support for tourism development. A diversity of tourism-based businesses will be encouraged in all 4 sectors of responsible indigenous tourism. We will responsibly build, support and grow our industry for generations to come.

Building on Sustainability

Ensuring our Sustainability while Growing our Local Economy

Social
(Authenticity & Culture Preservation)
Tourism development will respect and preserve our local culture & heritage, creating opportunities for the Cultural Entrepreneur and stronger, longer lasting relationships with our partners.

Environmental
(Responsible Tourism Development)
Tourism development will create awareness of our natural history & environment. We are stewards of the land, and development will respect our wealth of natural resources for future generations.

Financial Sustainability
(Provincial Economic Growth)
We will ensure market match opportunities exist to enable local businesses to thrive and create new opportunities for future entrepreneurs.
Investing in ITO’s Future

The investment required now and over the next 5 years is $6.8M just under (1%) of what we will get in return by investing in the anticipated growth of $629M total tourism output over the next 5 years. Furthermore, it is estimated that Indigenous tourism will generate over $12 billion in total output and $8.7 billion in GDP to Ontario’s economy by 2020.

The Business Plan & Strategy developed in 2009 was reviewed and updated accordingly to ensure alignment with the ITO 2020 Strategy. Updates to the proposed budgets and activities support the 2020’s key initiatives.

The following key initiatives outline the investment of $6.8 million over the next 5 years that is required to successfully start and run the ITO organization.

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<tbody>
<tr>
<td>Transition and Launch of ITO Operation</td>
<td>376,075</td>
<td>573,750</td>
<td>564,825</td>
<td>580,131</td>
<td>580,131</td>
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<td>Focus on ITO Rebrand &amp; New Marketing Efforts</td>
<td>253,000</td>
<td>328,000</td>
<td>252,500</td>
<td>262,500</td>
<td>252,500</td>
<td>$1,348,500</td>
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<tr>
<td>Promote and Deliver Capacity Building Programs and Services</td>
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<td>531,536</td>
<td>430,250</td>
<td>364,000</td>
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<td>Implement and Develop the Authentic Indigenous Moments Program (AIM)</td>
<td>125,000</td>
<td>280,800</td>
<td>75,000</td>
<td>75,000</td>
<td>75,000</td>
<td>$630,800</td>
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<tr>
<td>Develop Regional and Provincial Partnerships</td>
<td>140,000</td>
<td>55,000</td>
<td>55,000</td>
<td>55,000</td>
<td>55,000</td>
<td>$380,000</td>
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<td><strong>Total</strong></td>
<td><strong>$1,044,075</strong></td>
<td><strong>$1,617,050</strong></td>
<td><strong>$1,478,961</strong></td>
<td><strong>$1,406,997</strong></td>
<td><strong>$1,320,631</strong></td>
<td><strong>$6,873,614</strong></td>
</tr>
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</table>

‘This is a win-win for our communities, industry partners, businesses and most importantly, Ontarians and Canadians.’

Indigenous Tourism Ontario

1% Investment
Developing 4 sectors of responsible tourism:

Responsible community-based tourism and entrepreneurship with a focus on culturally authentic products & services is our advantage. Quality, innovation and community capacity are central to our approach to support organic growth in 4 sectors of indigenous tourism:

1. Cultural, Ecotourism & Adventure
2. Sports & Recreation
3. Accommodations & Food Services
4. Events & Tourism Business Services

Implementing our 2020 Key Initiatives

Our immediate attention for 2015/16 focuses on the completion of 5 key initiatives to reach our goals on becoming a sustainable organization.

1. Transition and Launch of ITO Operation
2. Focus on ATO Rebrand & New Marketing Efforts & Membership Recruitment
3. Promote and Deliver Capacity Building Programs and Services
4. Implement and Develop the Authentic Indigenous Moments Program (AIM)
5. Develop Regional and Provincial Partnerships

A Foundation for Success

We are well positioned to be leaders in developing indigenous tourism in Ontario. Our efforts for developing the North have been fruitful, our leadership strong, and our efforts recognized. It is time to officially launch an organization dedicated to implementing a solid plan with a passionate focus on making all of Ontario a unique indigenous tourism destination for our welcomed guests. We believe in our communities, partners and investors and we want to make them proud and prosperous. To our region, province and beyond, we are ready to provide an excellent product while creating jobs and adding to the economy.

Indigenous Driven

It’s time for Ontario’s Official Indigenous Tourism Connection!

Investing in our Future
Project Overview

This brochure has been changed April 2019 to reflect Indigenous Tourism Ontario (ITO), originally referred to as Aboriginal Tourism Ontario (ATO).

In order for Indigenous Tourism Ontario to be a recognized provincial organization we needed to start with a solid foundation of listening and providing a strong network for Indigenous collaboration, partnerships and product.

We recognized this is a first step in establishing a professional organization that will eventually lead to a sustainable entity that will increase Indigenous tourism in Ontario. Our team kept the following goals at the forefront of the work set out:

- Enhance Indigenous tourism across the province.
- Support regional and provincial collaboration and coordination of Indigenous tourism.
- Encouraging engagement of industry partners to broaden the financial base and extend reach.
- Support a coordinated approach that aligns planning, product development, investment attraction and workforce development in regions.
- Provide a solid foundation for Indigenous tourism businesses to positively impact Ontario’s economy.

Our Project team conducted 5 activities relating to the completion of this project. The following work was completed during Summer/Fall of 2015:

1. Industry Evaluation, Partnerships & Stakeholder Engagement
2. Targeted and Partnered Marketing
3. Ontario Aboriginal Tourism Economic Impact Study
4. Update the ITO Strategy – ITO 2020 Plan
5. Build ATO Brand – Stage 1: Preliminary needs

The aforementioned activities’ findings are detailed in ITO 2020 Final Report. Highlighted findings are found within this brochure.