CONTINUING OUR JOURNEY

STRATEGIC & COVID-19 RECOVERY PLAN

2020-2025
For Indigenous tourism throughout Canada, 2020 was poised to be one of the most successful years to date. Ontario plays an important role in the industry’s collective success, supporting the country’s largest Indigenous tourism segment.

Prior to COVID-19, with more than 12,000 people working in close to 600 businesses, we contributed $622 million (34%) to Canada’s Indigenous tourism GDP. Indigenous Tourism Ontario (ITO) has led this growth by being grounded in local realities and focusing on our communities and operators.

Due to COVID-19, ITO estimated that our provincial Indigenous tourism industry will see the temporary or permanent closure of approximately 350 businesses while losing 7500 jobs and $370 million in direct revenues. Projections from the Conference Board of Canada paint an unsettling picture; Indigenous tourism in Ontario could see a 63% decline in GDP, a 51% decline in employment, and the permanent closure of up to 218 businesses. Increased investment and support for Ontario’s Indigenous tourism industry is required to enable ITO to implement our Recovery Plan, cementing partnerships and financial commitments that will result in sustainability and growth.

ITO has worked diligently to create a Recovery Plan that supports its members, guiding businesses through these unfamiliar times. ITO’s Recovery Plan was developed to accurately advance ITO’s COVID-19 Path Forward Framework, enhancing the 3-phase strategy in alignment with the Indigenous Tourism Association of Canada’s (ITAC) Strategic Recovery Plan, and with Reopening Ontario, our provincial COVID-19 strategy.

The many voices of our industry have helped us curate a thoughtful plan which will Preserve our strong and determined Indigenous tourism businesses. Renew our provincial Indigenous tourism industry on the heels of the pandemic’s retreat, and Rejuvenate the spirit of our people, visitors, and industry.

We have developed ITO’s Recovery Plan with a multi-dimensional approach, addressing the social, economic, environmental, and cultural impacts (SEEC Model) of the pandemic on our Indigenous tourism industry, and exploring how we can move forward balancing each of these elements while considering the communal good of our people, communities, province, and country. Importantly, with the ongoing global reaction to the need for equal rights and opportunities for all, ITO will lend its support to these initiatives, and advocate for Indigenous inclusivity.

We have already taken action to adapt to the current climate and have considered programming initiatives to provide support directly to our industry. In doing so, ITO’s Recovery Plan is integral to our organizational Strategic Goals as outlined in ITO’s 2020 Investing in Our Future plan, to continue building upon the critical work of our important journey. The COVID-19 pandemic will not be the end, but we must continue to advance our industry’s progress with the same urgency that we are directing to our current efforts of preservation.

Our Strategic Goals are:

- Developing Operational Sustainability & Brand Integrity
- Building Capacity & Increasing Economic Opportunities
- Marketing & Branding Authentic Products & Services
- Providing Support for Communities & Entrepreneurs

These goals and ITO’s Recovery Plan are aligned with our Critical Path. We will ensure responsible growth through gaining organizational sustainability, utilizing an innovative grassroots approach, attracting investments, developing partnerships, and implementing ITO’s 2020 specific initiatives in response to COVID-19.

In the spirit of Indigenous inclusion, cultural understanding, and reconciliation, we will collaborate with all partners who share our values and aim to renew the Indigenous tourism industry. We are confident that working together with our Indigenous leadership groups, governments, and strategic partners will empower us to become even more resilient, sustainable, and inclusive in the future. When we move forward hand in hand, we will foster the changes needed to rejuvenate our Indigenous tourism industry.

Miigwetch,

Indigenous Tourism Ontario
LISTENING TO OUR MEMBERS

In keeping with our Guiding Principle of utilizing an innovative grassroots approach, we recognize that all of ITO’s member businesses will be impacted by the pandemic in some way, some significantly.

ITO commissioned industry experts – seven Business Support Brokers (BSBs) – to work with our members while gaining their insight at this critical time, yielding important information about common experiences shared by our members. Some of the shared experiences and sentiments captured by the BSBs include:

- Businesses that didn’t die on impact are asking ‘Am I Alive?’ from an economic standpoint. Where are we going and what do we do next?
- Some business owners have resorted to not paying themselves to keep their business afloat.
- Many ‘mom and pop’ operations found that funding opportunities didn’t fit for them; funding and support needs to be more accessible to businesses of all sizes, and stages of market readiness.
- Operators and businesses need guidance and on the ground support to work through COVID-19.
- Operators had to turn away business due to their communities being closed to visitors.
- Remote fishing and hunting lodges that rely completely on the US market have lost 100% of their bookings for this year.
- Staff layoffs, downsizing, and challenges paying rent are commonplace.
- Many businesses are unsure about what reopening will look like; many are learning as they go.
- Many operators are facing product distribution challenges as the industry begins to rely more on e-commerce and virtual marketplaces.
- Operators are getting used to a slower pace and the new way of communicating with their customers.
- Resources and support for accessing and maintaining employees would be beneficial for some businesses.

Overall findings from the Business Support Brokers’ revealed significant themes: the need for Leadership & Advocacy to understand and support businesses’ unique circumstances; the need for urgent and focused Financial Support & Investment to keep businesses running; the need to best embrace Adaptation & Innovation for marketing, operations, and guest experiences; and the need for Communication, Collaboration, and Partnerships. Perhaps most importantly, BSBs shared what they believe ITO Can Do to best help operators, and support an anxious industry. As a result ITO has identified programs and initiatives that will directly support industry’s needs.

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ART TRUDEAU
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Mukwa Adventures, Sagamok, Ontario

“We have lost 100% of our revenue for this summer and have already utilized all of our savings just to stay afloat to this point. We appreciate the support from the Indigenous Tourism Ontario (ITO) Business Support program and are looking forward to further help. We are exploring how to best incorporate Virtual tours and Virtual Reality tours into our product offerings in partnership with ITO. Although we are struggling right now, we have started thinking about how to come out of this.”

MICHELLE SAVOIE
Voyageur Wilderness Programme, Atikokan, Ontario

“We are not currently officially open and are assessing the ability to provide limited services this summer season. Given COVID-19 and all of our visitors cancelling or rescheduling to 2021, we are very limited. Also, following public health guidelines in discouraging non-essential travel to our remote area (with very limited health services) is a shared responsibility.”

MICHELLE SAVOIE
Voyageur Wilderness Programme, Atikokan, Ontario
BREAKING TRAIL & LEADING THE WAY

By prioritizing the themes that were revealed by the work of the BSBs, ITO reinforces itself as a vehicle of support for getting Indigenous businesses back on their feet. ITO will soon launch an adaptation of the BSB program that will link our members with Indigenous Business Advisors (IBAs) who will provide on-the-ground assistance and coaching. This way, we will help Indigenous businesses keep their doors open, or use this time to refocus and rebuild, and to continue supporting the renewal of Ontario’s Indigenous tourism industry through the following themes.

LEADERSHIP & ADVOCACY

Now more than ever, Indigenous businesses need leadership to provide a unified voice for their industry. Support from community, provincial, and federal governments will be essential for these businesses to survive and thrive. Additionally, ITO will continue its role as an industry leader and advocate, ensuring that responses to the pandemic are in touch with Ontario’s local realities, while highlighting Indigenous tourism as an important part of the road to reconciliation. Social equality and inclusivity will play a meaningful role in ITO’s future advocacy efforts.

FINANCIAL SUPPORT & INVESTMENT

It is clear that financial hardship has been the greatest barrier. Businesses need access to more tools and resources to support themselves financially, and access to these resources needs to be on a level playing field to ensure that smaller businesses do not get left behind. ITO will continue to be the voice of the industry, advocating even more so for Indigenous tourism’s crucial role in the economy.

ADAPTATION & INNOVATION

As our members navigate through COVID-19, we will be there to support them by deploying our on the ground initiative utilizing ITO’s Indigenous Business Advisors (IBA). Embracing innovation, technology, and digital platforms will help businesses to find new revenue streams now and into the future. ITO is staying informed on trends in the tourism sector, and aims to coach and build the capacity of Indigenous businesses to implement operational efficiencies both online and on the ground. In addition, ITO will help businesses navigate accessible markets, develop authentic experiences, and market their products virtually in order to be sustainable and resilient.

COMMUNICATION, COLLABORATION, AND PARTNERSHIP

Business owners are asking, ‘How can we come together?’ ITO recognizes the opportunity for increased networking and collaboration amongst Indigenous tourism businesses and associations, and is welcoming of business owners and industry partners who wish to be part of the solution. Now is the time for collective change – our members are ready to engage in meaningful cooperative dialogue and action. ITO will be mindful of National and Provincial efforts to avoid duplication.
EMBRACING CHANGE

ITO will continue to be the voice for our province’s Indigenous tourism industry. Leading the way while being firmly rooted in the local realities of communities across all regions will ensure that Indigenous tourism operators and organizations at all levels of market readiness receive the support that they require.

As the impacts and challenges imposed by COVID-19 become clearer, ITO has been called to duty to lead the industry through these turbulent waters. ITO will embrace the changing landscape of the tourism industry to capitalize on new trends while continually aligning with the traditional values of our communities. ITO’s mandate to assist Indigenous communities and entrepreneurs with programs that build capacity to produce high quality products and services will be guided by its organizational directions of product development, marketing, training, and cultural authenticity.

ADAPTING TO COVID-19 INDUSTRY TRENDS

ITO is prepared to adapt and innovate. The evolution of the travel industry in response to COVID-19 will certainly bring some uncertainties, however ITO sees many opportunities for the Indigenous tourism industry in Ontario to continue to grow.

PRODUCT DEVELOPMENT

• Virtual reality (VR), augmented reality (AR) and artificial intelligence (AI) will become key elements of successful destination development.
• The desire for intimate and immersive experiences will drive traveller motivations as they search for meaningful and less crowded trips.
• Indigenous culinary experiences that ignite the senses and highlight traditional foods as well as the stories that go along with them is a trend only to be strengthened by the easing of restrictions.
• E-commerce including virtual marketplaces and online sales will be a mainstay for Indigenous tourism businesses.

MARKETING

• Tourism marketing in the era of COVID-19 will be centred upon rebuilding the confidence and trust of travellers with compassion and reassurance. Key marketing messages will focus on health and hygiene.
• During the initial stages of recovery, targeting the domestic market will take precedence with messaging that places an emphasis on supporting local and exploring their own backyard.
• Enhancement of the consumer’s perceived value of an Indigenous experience by highlighting the industry’s unique capabilities for personal transformation and renewal will play a key role in reviving the industry.
• Social content and sharable moments will contribute to recovery via strategic marketing especially amongst Gen Z and Millennial travellers.

TRAINING

• Many Indigenous businesses are using the downtime spurred by COVID-19 to reassess and retool. Planning, increasing efficiencies, and learning new skills will be critical throughout the recovery.
• E-learning will only become more prominent to gain the required skills to ensure operational sustainability and innovation.
• Disturbances in supply chains will require restructuring and adaptation on behalf of Indigenous tourism businesses.
• Uncertainty will require operators to be flexible in their policies and responsive to the new market post COVID-19.

CULTURAL AUTHENTICITY

• As the world emerges out of COVID-19, the new traveller will seek experiences for personal renewal. Authentic and meaningful Indigenous experiences will only become more desirable.
• Sustainability will be top-of-mind for visitors who have had time to reflect on their own personal values. Destinations that consider the impact of the social, economic, cultural, and environmental well-being of the people and places they visit will be attractive, as they are more meaningful and transformative.
• Destinations that allow visitors to minimize physical contact with others will become more sought after; therefore, land-based experiences will become more popular.
THE ROAD TO RECOVERY

ITO has drafted its own complementary 3-step plan for our members that is carefully aligned with the Indigenous Tourism Association of Canada (ITAC)’s Strategic Recovery Plan 2020-24, and with Reopening Ontario, our provincial COVID-19 response strategy.

This will be an organic pathway to the rejuvenation of Ontario’s Indigenous tourism industry that takes into account the dynamic and changing nature of the world. What we have learned is that the pandemic has its own time, during which we will take the necessary steps forward to rebuild and enable growth once again.

2020-2021 PRESERVE

Our priority is the well-being of our members, and ensuring each business is given the utmost support. ITO will work directly with our operators to preserve their livelihoods through this uncertain time in our industry. We will align investments with our National, Provincial, and Regional Partners.

2021-2022 RENEW

By incorporating new trends and aligning with our traditional values, we will embrace this time of renewal by engaging in product development, marketing, training and cultural authenticity.

2022-2025 REJUVENATE

We will continue to coordinate and administer the ITO Recovery Plan to effectively and efficiently assist in the growth of the sector in the next 3-5 years of recovery. We believe in the spirit and resiliency of our people, and we know that our members will emerge from this experience with a rejuvenated sense of accomplishment, and the opportunities that lie ahead.
CONTINUING OUR JOURNEY
Our Vision to Preserve, Renew, and Rejuvenate

ITO will embark on a 3-step plan using a holistic approach that makes taking care of our people and communities the first priority. Our approach will be guided by the overarching values of social, cultural, economic, and environmental sustainability. We will build off our previous plans and efforts and continue our journey, adapting and embracing the changes with our hearts and minds, using our already mastered skills of resiliency.

Our plan builds on the need for decisive immediate actions, and captures crucial concepts for our industry to adapt and prosper.

• Revisit ITO’s governance model to better support membership such as a Champions Council, skills-based Board, and secure human resources to implement ITO’s Plan to Recovery.
• Clearly outline and communicate health regulations, safety standards, and reopening guidelines for businesses.
• Develop a Business Support Program and deliver on the ground coaching and support for operators.
• Make more tools and financial resources available for businesses to support themselves, focusing on equal access for all levels of business.
• Develop an Economic Assessment Model to evaluate the impact of COVID-19 on Indigenous tourism businesses and operators.
• Conduct a gap analysis to determine training and coaching needs for businesses to implement new technologies and innovations, enhance experiences, refine operations, and adapt policies and procedures.
• Build upon ITO’s Critical Path and Strategic Plan initiatives for the organization’s sustainability.
• Develop Virtual Reality and Augmented Reality tours in collaboration with ITO members.
• Partner with and support innovative virtual programs like Summer Solstice Indigenous Festival and the Indigenous Experience Ontario website.
• Refocus effort on the domestic market opportunities which comprise 80% of tourism spending in Canada.
• Produce videos to stimulate product development and immersive marketing (Pull the Fire TV & Behind the Scenes with Laurence Fishburne).
• Implement Ontario Authentic Indigenous Moments (OAIM) program recruitment, awareness campaign, marketing and support for cultural entrepreneurs.
• Build upon OAIM framework and integrate AR/VR into product offering.

• Implement a consumer confidence campaign for Indigenous tourism operators to signal that they have implemented procedures to follow government and industry COVID-19 guidelines relating to cleanliness and social distancing, indicating they are ready for visitors.
• Develop and implement a province-wide Indigenous culinary model that supports cultural entrepreneurs and stimulates growth in this sector, starting with implementing experimental pilot programs and highlighting culinary champions.
• Continue to develop Ontario’s Indigenous Food Tourism Strategy, such as establishing partnerships for Indigenous Culinary Innovation Centre of Excellence initiatives and supporting Indigenous Culinary of Associated Nations (ICAN).
• Create partnerships and advocate in collaboration with Indigenous Financial Institutions (IFIs) and Indigenous Education Institutes to strengthen and support Indigenous tourism businesses.
• Create marketing partnerships with Regional Tourism Organizations, ITAC, Destination Ontario, IEO, and Identifier Programs to ensure content for Indigenous inclusivity, while minimizing duplication and benefiting from collective marketing.
• Partner with the Ministry of Heritage, Sport, Tourism, and Culture Industries to help protect businesses.
• Align with key industry partners and neighbours and establish MOUs and alliances with Indigenous and non-Indigenous organizations for an inclusive Ontario.
• Collaborate, align, and coordinate with existing industry programs (e.g. Project Rise, Destination Indigenous, Science North, Ontario Tourism Innovation Lab’s Spark Program, etc.).
• Integrate new and existing Key Performance Indicators to meet investors’, partners’, and industry’s expectations.
• Work with land recognition and reconciliation programs such as the Moccasin Identifier Program.
• Continue to implement Preserve initiatives as outlined for 2020-2021.
• Build upon the BSB program to implement an enhanced online business support program focused on one-on-one interaction for operators to work with, to be called the Indigenous Business Advisors (IBA) program.
• Increase domestic product development and marketing to draw visitors from within Ontario.
• Implement and promote virtual tours, VR tourism experiences, and virtual marketplaces.
• Assist Indigenous businesses with operational efficiencies and navigating domestic markets.
• Consult resources such as Destination Canada’s EQ profiles and design products according to identified market segments (consumer matching).
• Establish an Elders Council.
• Develop and implement a community tourism assessment tool.
• Conduct a partnership impact study to assess the value of partnerships and leveraging such as collective marketing.
• Empower operators and communities to develop and share immersive, authentic cultural experiences that have intrinsic value for the visitor.
• Develop My Community App, a province-wide digital storytelling portal.
• Continue to engage and implement traditional marketing tactics such as FAM tours, geographic branding and thematic routes, trade missions, and interactive kiosks at Ontario Visitor Centres.
• Explore opportunities for ITO to be a conduit for aligning government regulations and policies to better assist our remote Indigenous businesses access more market share.
• Support promotion of Indigenous tourism to the local markets and increase online Indigenous tourism marketing and branding opportunities.
• Collaborate on information sharing of tourism efforts and partnerships between neighboring communities, municipalities and the private sector.
• Identify opportunities to enable, support, and promote travel of tourists visiting northern and remote communities (e.g. gravel runways, accommodations).

RENEW - OUR PROVINCIAL INDIGENOUS TOURISM INDUSTRY ON THE HEELS OF THE PANDEMIC’S RETREAT (2021 - 2022)

• Continue to build upon all Preserve and Renew initiatives as outlined for 2020-2021 and 2021-2022.
• Focus on reaching national and international markets.
• Maintain alignment with national initiatives for business market-readiness levels.
• Maintain and expand cultural authenticity recognition program.
• Be accountable to a plan based on leadership and advocacy, financial support and investment, adaptation and innovation, and communication, collaboration, and partnerships.

REJUVENATE - THE SPIRIT OF OUR PEOPLE (2022 - 2025)

• Measure and report on Key Performance Indicators and adapt to the evolving industry as a result of COVID-19.
• Produce a strategy to prepare for the next 5 years.
• Continue to further the evolution of an Indigenous tourism industry that prioritizes lower volume and higher quality.

VISION & SPIRIT
OUR CROSSING PATHS – MEANINGFUL PARTNERSHIPS & INITIATIVES

To navigate these unfamiliar waters, we need many paddlers. We are thankful for the support from federal and provincial government agencies, as well as industry organizations such as Destination Canada, and Destination Ontario.

This support helps ITO to properly fulfil its mandate and obligation to our members. ITO is fortunate to work with a network of strategic partners, Indigenous and non-Indigenous alike, on some of our current initiatives including:

- Indigenous Experience Ontario (IEO) - a consumer facing website with Integra Designs.
- Virtual Reality content development - innovative product development with Orign Recruitment-Immersive Link.
- Indigenous Food Tourism Strategy - activating the Indigenous food scene with the Culinary Tourism Alliance.
- Industry training & capacity support programs – Ontario Tourism Education Corporation.

ITO is also exploring and welcoming partnerships and MOUs to pursue the following initiatives:

- Indigenous culinary training and development model.
- Increasing business accessibility to capital through Indigenous Financial Institutions (AFIs).
- Social content by influencers and exploring a series of television productions.
- Work with Indigenous Educational Institutes, colleges, universities and programs such as Tourism Excellence North.
- Supporting and marketing grassroots Indigenous cultural entrepreneurs and operations.
- Indigenous promotional content in regional and international airports.
- Working with existing organizations to market Indigenous initiatives and events such as Pow Wows.
- Increasing Indigenous content in provincial/national parks and museum exhibits.
- Work with land recognition and reconciliation programs such as the Moccasin Identifier Program.
- Support for Indigenous artists and makers.
- Cooperative marketing opportunities.
- Indigenous tourism development in all provincial tourism regions in collaboration with RTOs.
- Supporting members, amplifying their work, and reinvesting into youth.
- Membership alignment with complementary industry associations.
- Develop and expand on Indigenous involvement in the Great Lakes waterway with re-emerging cruise ship opportunities and compatible sectors.

Looking forward, ITO welcomes a discussion with any organization that shares similar values and would like to explore collaborative projects that can support the Indigenous tourism industry in Ontario.
ITO is working hard to support and expand our provincial tourism industry, and is committed to helping every one of our members achieve success. But as the largest contributor to our Nation’s Indigenous tourism industry, we cannot achieve our goals without invaluable financial assistance. Particularly at this critical time for tourism in Canada, we need as many resources as possible – industry partnerships, government collaboration, dedicated staff and members, and proper funding – to enable us to meet the objectives in this Recovery Plan and create a platform for future growth. The time must be now.

As stated in ITO’s 2019 Jurisdictional Scan Report, it is recommended that provincial and territorial Indigenous tourism associations receive at least 1% of their GDP contribution as core funding to support their members. However, ITO is cognizant that Indigenous tourism in Ontario could see a 63% decline in GDP. As a result, ITO’s annual operating budget is set at 0.35% of Indigenous tourism’s contribution to Ontario’s 2019 GDP. Our budget is mindful of the anticipated drop in industry output and ability to efficiently execute our 5-year Recovery Plan.

Comparatively, the Jurisdictional Scan Report found successful best practices like BC’s Indigenous Tourism Organization (ITBC) received 0.83% for their operating budget based on contribution to the GDP. To put this into perspective, non-Indigenous tourism associations such as Ontario’s Regional Tourism Organizations (RTOs) received approximately 5% of tourism contribution to the Ontario GDP for annual operating budgets.

ITO has created key performance indicators (KPIs) to monitor the success and investment for our planned initiatives and organizational effectiveness. We will implement our strategy while remaining transparent and accountable to our industry, investors, and partners. 80% of our operating budget will directly support initiatives that will help our members in rejuvenating our industry.

ITO’S BUDGET FOR RECOVERY
CONTINUING OUR JOURNEY 2020 - 2025

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We extend special thanks to ITO’s industry partners for their contribution to this document. For more information on this project such as partnership opportunities and/or involvement, visit us at www.indigenoustourismontario.ca or email info@indigenoustourismontario.ca.

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Plan structured and designed by:

Supported by:
MINISTRY OF HERITAGE, SPORT, TOURISM & CULTURE INDUSTRIES

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