Ontario’s Indigenous Tourism Landscape
Foundational Research Study 2019

Commissioned by:
Indigenous Tourism Ontario (ITO)

Prepared by:
Canadian Ecotourism Services (CES)
The spirit of this document.

Many voices have contributed to identifying the needs and exposing the opportunities for Ontario’s Indigenous tourism industry. In this very spirit, ITO will nurture the findings and embrace the notion this be treated as a living document. ITO will share our findings and update information as required for the betterment of our members, partners and industry. Some of our findings are directly related to publicly available information, if your organization wishes to update any information please contact ITO directly.

ITO would like to encourage all associations to share, learn and build our industry together; meaningful collaboration will be key for Indigenous organizations and partners to strategically build our industry and economy. Miigwetch for your contribution.

Kevin Eshkawkogan

With special thanks to:

Kevin Eshkawkogan for his guidance and support throughout this research study. Steven Antoine for his participation and contribution during the Regional Workshops Tour.

Most importantly, thank you to all the Indigenous tourism businesses, Indigenous community members, tourism partners and leaders of provincial Indigenous tourism associations who participated in the regional workshops, survey and telephone interviews. We appreciate your support and respect your vision for growing Indigenous tourism in Ontario and Canada.

Images used in this document to illustrate and/or provide vision were provided by the ITO, CES and via the worldwide web and hereby give credit to the organizations mentioned throughout this document.

All research methodologies and findings are the opinions of the Consultant Canadian Ecotourism Services with inclusions of cited references as appropriate.
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1.0 Study Introduction & Background

1.1 Inspiring Indigenous Tourism 2019

Background

Since its inception, Indigenous Tourism Ontario (ITO) has been the provincial leader guiding the development of tourism throughout the province.

Initiated by the Great Spirit Circle Trail (GSCT) in 2009 and originally referred to as Aboriginal Tourism Ontario (ATO), ITO started with minimal resources as a grassroots organization with efforts to support, market and grow Indigenous Tourism in Ontario. ITO markets tourism experiences to visitors from within Canada and abroad and supports Indigenous communities and entrepreneurs in the development of market ready products and services. In 2015, supported by Minister Coteau and the Ministry of Tourism Culture and Sport (MTCS), ATO (ITO) created ‘ATO’s 5-Year 2020 Strategic Plan’, outlining the organization’s goals which include: developing operational sustainability and brand integrity, building capacity and increasing economic opportunities, marketing and branding authentic Indigenous products and services, and providing support for communities and entrepreneurs.

In 2019, the Conference Board of Canada and the Indigenous Tourism Association of Canada (ITAC) reported that Indigenous tourism in Ontario contributes over $622M to Canada’s GDP. This is substantially higher than any other province, totalling 34% of the national GDP contribution for Indigenous tourism. In addition, Ontario’s Indigenous tourism industry contributes over 10,750 full-year jobs to the economy, which accounts for 34% of all Indigenous tourism jobs in Canada.

As mentioned, ITO has historically operated as a grassroots organization with minimal resources, provincial reach, and funding. Due to this lack of support, ITO’s organizational capacity has been limited compared to the size and value of the Indigenous tourism industry in the province.

Research Study Purpose

ITO commissioned this 2019 Research Report with the goal of working to develop an Action Plan to support Indigenous communities to better leverage tourism and cultural assets to advance economic development opportunities.

The outcome of this research report is to provide concrete action items and strategies for supporting and growing Indigenous tourism in the province, based on sound primary and secondary research conducted on behalf of ITO. ITO will use the research to inform its organizational strategy moving forward.

The Action Plan will rely upon foundational research which is necessary to better understand the current Indigenous tourism landscape in Ontario, and to evaluate the successful approaches. The objectives of the 2019 Research Study are as follows:

1. Improve Ontario’s understanding of the Indigenous tourism landscape
2. Examine and evaluate the success of other jurisdictions and assess their applicability in Ontario
3. Support Indigenous communities in identifying opportunities to better align their tourism and cultural assets with economic opportunities
4. Inform Ontario’s policy approach to supporting Indigenous economic development
1.2 Research Study Approach & Methodology

In order to fulfil the above objectives, primary research was conducted with key stakeholders across the province and industry leaders across the country; research activities included:

- An inventory of Indigenous tourism businesses in Ontario
- An online and hard copy survey of Indigenous tourism businesses
- An online and hard copy survey of Indigenous communities
- An online and hard copy survey of Indigenous tourism partners
- Regional workshops and focus groups in 6 cities across Ontario with various Indigenous tourism stakeholders
- Interviews with leaders of various provincial Indigenous tourism associations to evaluate successful jurisdictional approaches

Inventory of Indigenous Tourism Businesses in Ontario

The first step in acquiring a better understanding of Ontario’s Indigenous tourism landscape was identifying the businesses of which the industry is comprised. ITO compiled an extensive list of over 600 Indigenous-owned tourism-related businesses detailing each business’ location, primary product/service offering, contact information, and Indigenous community if applicable.

The development of this list was essential in order to reach ITO’s most important stakeholders. For information and characteristics of Ontario’s Indigenous tourism businesses, see section 4.2

Indigenous Tourism Survey

The online and hard copy surveys consisted of 3 versions targeting: Indigenous tourism businesses, Indigenous communities, and Indigenous tourism partners.

The Indigenous Tourism Business survey was designed to gain a better understanding of the operating characteristics and environment that businesses face. It was also designed to obtain information on the performance, key challenges and opportunities for Indigenous tourism businesses in Ontario.

The Indigenous Communities survey was designed to understand the situation faced by communities who have or are currently pursing tourism or wish to pursue tourism in the future. The objective of this survey was to identify some of the key products and services that would be (or have been) well suited to Indigenous communities. The survey also asked participants to describe the main challenges and opportunities for growing Indigenous tourism in their communities.

Lastly, the Indigenous Tourism Partners survey was designed to gauge the support for Indigenous tourism from key provincial organizations, ministries, departments and the travel trade.

This survey was also created in order recognize the opportunities for potential partnerships throughout the province.

All participants of the survey were asked to share their opinions relating to reconciliation and how Indigenous tourism can be used to foster greater understanding amongst Indigenous and non-Indigenous cultures in Ontario.

The surveys were available online from August 28, 2018 to December 10, 2018 and the hard copy surveys were distributed during the regional workshop series. A total of 127 respondents participated in the survey.

The surveys were promoted using a province-wide awareness campaign targeting all Indigenous tourism businesses developed as part of the inventory, all 133 Indigenous communities in Ontario, and various organizational partners.

Regional Workshop Series

The same province-wide awareness campaign was used to encourage participation at the ITO Regional Workshops. A series of email and online advertising campaigns were launched as well as faxes and promotion at industry events.

The Regional Workshops took place over 2 weeks in October and November of 2018 in Toronto, Sudbury, Sault Ste. Marie, Thunder Bay, Kenora and Ottawa. The free event offered participants the opportunity to learn more about ITO’s programs and services, obtain free ITO membership and contribute to the research study. A total of 78 individuals attended the ITO Regional Workshops and over 130 people registered.

Consultation and research at the workshops took the form of focus group sessions. Small groups were formed, and participants were asked to respond to 4 key questions relating to ITO’s foundational research. The responses were documented and analyzed.
Jurisdictional Scan Interviews

As the final stage of research, phone interviews with the leaders of provincial Indigenous tourism organizations were conducted. The objective of the interviews was to acquire a greater understanding of the organizational framework of the various provincial tourism jurisdictions currently functioning in Canada. Insight was gained on the various strategies that these organizations employ, successful undertakings in representing and supporting its members, as well as many other variables relating to a successful Indigenous tourism association.

Operating characteristics, organizational capacity, funding and budgets, training and support programs, membership structure, organizational marketing, as well as the primary challenges faced by their organizations were topics of discussion. The information that the research team was unable to gather by means of interviews was acquired from online, publicly available resources.

Secondary Research

In addition, secondary industry research was conducted summarizing the following:

- Forces shaping the future of Ontario’s Indigenous tourism industry
- Key trends affecting Indigenous tourism in Canada
- Global tourism trends and key markets
- Organizational strategies of key provincial departments influencing the growth of Indigenous tourism in Ontario
- Truth and Reconciliation Commission’s Calls to Action that are applicable to Indigenous tourism and Ontario’s Reconciliation Plan

1.3 Report Scope

This report begins with Indigenous Tourism in Ontario, an overview of the history, development and current state of the industry. Following this is a description of ITO, its achievements, strategies and current programs. Next the report explores some of the forces that are shaping the Indigenous tourism industry as well as some key trends and industry research.

The second section, Indigenous Tourism Jurisdictional Scan thoroughly analyzes the 12 Canadian jurisdictions and their strategies for growing Indigenous tourism in their province or territory.

The section Presentation of Findings shows the results of the province-wide consultation process that was completed for this research paper. Findings were gathered from the 3 surveys of Indigenous tourism businesses, Indigenous communities and Indigenous tourism partners, as well as from the ITO Regional Workshop Series.

The fourth section, Building a Strong Industry summarizes several important documents and strategies relating to tourism from the provincial and federal governments.

Following this, the section Reconciliation Through Indigenous Tourism, explores the various meanings of reconciliation, the commitments that the Ontario and Federal governments have made regarding reconciliation and the ways in which Indigenous tourism can help with reconciliation. This section also presents the results gathered from stakeholders relating to their opinions surrounding reconciliation and tourism.

Finally, Moving Forward consolidates all of the findings and information gathered throughout the research study to produce a list of action items for ITO to support the growth and sustainability of the Indigenous tourism industry in Ontario.
2.0 Indigenous Tourism in Ontario

2.1 Our Indigenous Tourism Landscape

Similar to the growth that is being experienced throughout Canada and beyond, Indigenous tourism in Ontario is seeing an increased demand in its Indigenous products, services and experiences. This section details:

- General characteristics that define the Indigenous tourism industry in Ontario
- An Overview of Ontario’s provincial Indigenous tourism association - ITO
- An environmental scan of factors affecting Indigenous tourism in Ontario

History & Development of Indigenous Tourism in Ontario

Since the arrival of Europeans in America, Indigenous peoples have been regarded as the ‘original tour guides’ of the area. Guiding, reconnaissance and environmental education have been ongoing since long before Canada was even a country. The contemporary Indigenous tourism industry is based on these ideas.

The Northern Ontario Native Tourism Association (NONTA) is most likely the first Indigenous tourism organization that was established in Ontario. Formed in 1987, NONTA had a similar mandate as many Indigenous tourism associations today: to develop tourism businesses and programs with First Nation communities in ways that respect Aboriginal culture and protect the natural environment. The organization was based out of Thunder Bay and had programs for supporting fly-in fishing lodges in remote communities. The legacy of this organization is Moccasin Trails Adventures, a group of remote fly-in fishing and hunting outpost camps owned and operated by First Nations people of north-western Ontario.

In the 1990s, the Aboriginal Tourism Association of Southern Ontario (ATASO) was formed and was supported by the Government of Canada in 2006 with a $60,000 grant. Soon after both NONTA and ATASO ceased to exist.

Since then there have been a few notable organizations leading the development of Indigenous tourism in Ontario:

- Great Spirit Circle Trail, located on Manitoulin Island, offers Anishinaabe cultural experiences ranging from soft adventure to wilderness eco-adventures and educational interpretive tours.
- Also located on Manitoulin Island, Wikwemikong Tourism offers visitors a chance to discover Canada’s only officially recognized unceded Indigenous territory through nature-based and cultural tours. In 2018, Wikwemikong Tourism was honoured with the inaugural Indigenous Tourism Award of Excellence by the Tourism Industry Association of Ontario.
- Six Nations Tourism, located in Ohsweken, also provides tours that take visitors to various community sites that showcase Haudenosaunee history and culture. Six Nations Tourism unites local businesses, artisans, cultural sites and more to provide an immersive authentic experience.
- Moose Cree First Nation is certainly leading Indigenous tourism development in Northern Ontario. Moose Cree Tourism offers cultural experiences including a tour of the community’s sites, and adventures out on the land, such as trap-line tours, snowmobile excursions, cross-country skiing, canoeing trips, snow-shoe expeditions, and boat tours up the Moose River to James Bay. The community also offers visitors an opportunity to explore the Cree Cultural Interpretive Centre and the world-renowned Cree Village Ecologde.
Lastly, Aboriginal Experiences in the Heart of Ottawa offers interpretive and hands-on experiences as well as a walking tour. Tours explore landscape, monuments, architecture and art through social, political and cultural issues from an Indigenous perspective.  

It should be noted that the above organizations are only a few of the notable and prominent examples of Indigenous tourism development in Ontario. However, there are numerous community-based initiatives, businesses and individuals that are offering Indigenous tourism at a grassroots level. The Indigenous tourism sector in Ontario is broad and far-reaching and may take many forms. Until now, Indigenous tourism in Ontario has lacked a coordinated approach, as regions, communities, businesses and entrepreneurs have traditionally worked in silos.

Size & Value of Indigenous Tourism in Ontario

The most recent data collected by ITO (2018) suggests that there is a total of 614 Indigenous-owned tourism related businesses in Ontario. This is an increase from 2014, which reported a total of 479 Indigenous tourism businesses.

The 2019 report released by the Conference Board of Canada and ITAC on the economic impact of Indigenous tourism indicates that Ontario is by far the largest contributor to the industry in terms of GDP and employment. Indigenous tourism in Ontario contributes $622 M of direct GDP, while contributing over 10,000 full-year jobs to the economy.

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<th>2018/19 Provincial Indigenous Tourism Contribution to GDP (millions)</th>
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Indigenous tourism’s $622M of direct GDP contribution is made up of several subsectors as follows:

- Transportation – $164.9 M (27%)
- Travel Services, Retail – $151.5 M (24%)
- Gaming – $123.3 M (20%)
- Accommodation – $54.9 M (9%)
- Recreation and Outdoor Activities – $41.1 M (7%)
- Arts and Heritage – $30.5 M (5%)
- Other – $16.5 M (3%)

When looking at Indigenous tourism’s contribution to employment, ITAC and the Conference Board of Canada have reported that Ontario contributes 12,924 of direct employment jobs to the economy. However, for the purposes of this report, the writer will focus on full-year (FY) jobs, of which Ontario contributes 10,750 FY jobs.

Please note that throughout this report, Indigenous tourism’s contribution to employment will be referenced in terms of full-year (FY) jobs, except as noted otherwise.

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<th>2018/19 Provincial Indigenous Tourism Contribution to Employment (FY-Jobs)</th>
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Indigenous tourism contributes 12,924 of direct employment jobs in Ontario and is broken into the following sectors:

- Travel Services, Retail – 2,626 (20%)
- Gaming – 2,425 (19%)
- Food and Beverage – 1,843 (14%)
- Recreation and Outdoor Activities – 1,705 (13%)
- Transportation – 1,646 (13%)
- Accommodation – 1,307 (10%)
The key drivers of GDP growth for Indigenous tourism are: travel services/retail, gaming and accommodations. The lead driver of employment is recreation and outdoor activities. In terms of regional diversity, Ontario continues to maintain the largest footprint, followed by BC.

Prior to the 2018/19 study, the most recent data on Indigenous tourism’s economic impact was released in 2014. The 2014 study indicated that the ‘total economic impact of Ontario Indigenous tourism in terms of GDP (value added)’ was $957,410,568 and the ‘total Indigenous tourism employment was 11,108 jobs’.

In 2017, the Ministry of Tourism, Culture and Sport released statistics relating to the key characteristics of visitors and visitor spending for Indigenous tourism in Ontario. The data is from 2014, below is a summary of the key findings:

- In 2014, there were 160,000 visits to Indigenous tourism in Ontario, 0.1% of total visits to Ontario
- These tourism visitors spent $76 M or 0.3% of total visitor spending in Ontario
- Ontario residents accounted for 72% of Indigenous tourism visits and 31% of spending
- 28% of Indigenous tourism visitors from Ontario are from Region 5 (the GTA)
- 27% of Indigenous visits took place in Region 13 (Northern Ontario)
- The average number of nights spent on Indigenous visits was 3.8, above Ontario’s average of 3.1
- Indigenous tourism visitors spent an average of $476 per trip
- Of Indigenous tourism visitors, 37% visited a historic site, 34% went to a park and 31% went boating
- 40% of overnight Indigenous tourism visits were spent at commercial accommodations
- The largest proportions of trips occur from October to December (42%) and July to September (38%)
- 46% of Canadian Indigenous tourism visitors had a household income greater than $100,000
- 37% of Canadian Indigenous tourism visitors had a university degree

During the consultation process for this research study, owners of Indigenous tourism businesses were asked how they would describe their business’ sales performance over the past year. Out of 23 respondents, 61% reported that their business was growing, and they experienced an increase from the previous year. 30% of respondents reported that their business stayed about the same. For more information about the characteristics of Indigenous tourism businesses in Ontario, refer to section 4.2.
Geographic Distribution of Indigenous Tourism Businesses in Ontario

There is a total of 133 First Nations communities across Ontario, all with distinct cultural traditions, practices and beliefs. Many communities are remote and/or isolated, making access difficult, especially for tourists.

The concentration of Indigenous tourism businesses across the province is directly affected by a tourist’s ability to visit the region. Of 23 Indigenous tourism businesses in Ontario, 61% indicated that they were located on reserve and 43% reported that their business was located in a small or rural community.

According to ITO’s 2018 research, the communities with the highest density of indigenous tourism businesses in Ontario are as follows:

1. Six Nations of the Grand River (154 businesses)
2. Wikwemikong (45 businesses)
3. Deseronto (26 businesses)
4. Curve Lake (22 businesses)
5. Golden Lake (16 businesses)
6. Sarnia (16 businesses)
7. Akwesasne (15 businesses)
8. Southampton (15 businesses)
9. Moose Factory (15 businesses)
10. North Bay (14 businesses)

Indigenous Tourism Industry Characteristics

During ITO’s 2018 research, an inventory of the province’s 614 Indigenous tourism-related businesses was developed, which was provided by the management of ITO. Each business was categorized by its primary service offering. It should be noted that businesses offering more than 1 service are reflected below accordingly.

Ontario’s Indigenous tourism industry is defined by the following characteristics:

- 25% of businesses are classified as ‘retail’
- 14% of businesses are classified as ‘food and beverage’
- 12% of businesses are classified as ‘outdoor adventure’
- 12% of businesses are classified as ‘other’
- 11% of businesses are classified as ‘accommodations’
- 9% of businesses are classified as ‘attractions’
- 9% of businesses are classified as ‘festivals & events’
- 5% of businesses are classified as ‘transportation’
- 2% of businesses are classified as ‘resort/casino’

Source: Indigenous Tourism Ontario

For more information about the characteristics of Indigenous tourism businesses in Ontario, refer to section 4.2.
For Indigenous tourism businesses in Ontario, the focus of marketing remains heavily on the domestic market. In the 2019 draft report released by ITAC and the Conference Board of Canada, the following markets were the focus of marketing activities on behalf of Ontario Indigenous tourism businesses:

- 88% towards Ontario
- 55% towards the rest of Canada
- 38% towards the United States
- 26% towards Europe
- 12% towards China
- 2% towards other Asian countries
- 14% towards other countries

Self-employed Indigenous people are most likely to reside in Ontario, making the province a hotbed for Indigenous entrepreneurs. 24% of the entire Indigenous self-employed population aged 15 years and over are located in Ontario.iii

ITO: Organizational Overview
ITO is the province’s first and only dedicated Indigenous tourism organization that focuses on uniting communities, organizations and industry leaders to support the growth of Indigenous tourism in Ontario. ITO’s mission is as follows:

To assist Indigenous communities and entrepreneurs with programs that build capacity to produce high quality products and services. ITO’s success will be guided by the positive impact on our people, our environment and our economies.

Organizational Strategy

ITO was started as a grassroots organization with a vision to represent and support the province’s many Indigenous tourism businesses, entrepreneurs, as well as Indigenous communities hoping to develop tourism. ITO had completed a number of foundational activities prior to becoming incorporated in 2016.

Originally, ITO was called ATO, Aboriginal Tourism Ontario. However, based on conversations with key industry leaders such as Constance Jamieson of Six Nations Tourism, Clinton Belcher of CES made a recommendation in ITO’s 2020 Strategic Plan to use Indigenous instead of Aboriginal. It was determined that it would be more appropriate to use Indigenous as this term accentuates Indigenous cultures as the First Peoples of this land. Since then, using ‘Indigenous’ has become standard practice and nomenclature.

In 2015, ITO completed its 5-year organizational strategy, establishing a vision for the year 2020. The vision is built on stakeholders who have overwhelmingly supported a single organization dedicated to building Indigenous tourism in Ontario. ITO’s collective vision supports an organization that will responsibly develop, market and grow Ontario’s Indigenous tourism industry with values and integrity.

ITO’s 2020 Strategic Goals are:
1. Developing organizational sustainability and brand integrity
2. Building capacity and increasing economic opportunities
3. Marketing and branding authentic products and services
4. Providing support for communities and entrepreneurs

Since the development of ITO’s 2020 strategy, a number of key initiatives identified in the strategy have been completed. In 2017, the following activities were completed, which will be elaborated on in the following sections:

- ITO Rebrand & New Marketing Initiatives
- Capacity Building Programs & Services
- Ontario Authentic Moments (OAIM) Program

ITO currently has a total of 2 staff, an executive director and an administration manager. In 2018, ITO opened its first permanent office near Little Current on Manitoulin Island.

ITO’s membership structure is described below:

<table>
<thead>
<tr>
<th>Organization</th>
<th># of Membership Tiers</th>
<th>Membership Categories (Non-Indigenous)</th>
<th>Requirements for Voting Status</th>
<th>Membership Fees</th>
<th>Membership Product Offerings</th>
</tr>
</thead>
</table>
| Indigenous Tourism Ontario    | 2                     | 1. Voting (a. business, b. Organization)  
2. Non-Voting (a. non-Indigenous, b. Indigenous start-up)                                              | - Minimum 51% Indigenous owned or controlled  
- able to host visitors (or represents businesses who are able to host visitors) and meets or exceeds the quality assurance and cultural authenticity standards established by ITO | $99 - Same as all categories | Indigenous-owned members have the opportunity to join the Ontario Indigenous Moments program and the Cultural Authenticity Program. |
Industry Partnerships & Collaborations

Establishing an array of key partnerships is crucial for ITO to achieve its aspirations for supporting Indigenous tourism businesses on a province-wide scale. Recent formal partnerships that have been established include:

A Memorandum of Understanding signed in 2018 between the Indigenous Tourism Association of Canada (ITAC), the Tourism Industry Association of Ontario (TIAO), and ITO to further the growth of authentic Indigenous market and export-ready businesses in Ontario. The 3-year agreement will ensure that ITO is aligned with ITAC in the following areas:

- Strategic Planning
- Marketing & Branding
- Organizational Policies & By-Laws
- Business Development Approach
- Research Efforts
- Industry Partnership Opportunities
- Organizational Leadership

All of these above priorities will ensure the highest standards of an Indigenous-controlled, industry-led, not-for-profit Indigenous tourism association.xiv

ITO also has had a working relationship with the Ministry of Tourism, Culture, and Sport with primary goals to utilize Indigenous tourism to preserve Indigenous culture and to maximize the Ontario Indigenous tourism industry.

ITO is currently working with Dr. Rhonda Koster of Lakehead University on a research project entitled: Methods of Indigenous Consultation for Resource-based Research: Moving from tokenism to relationship building in the ‘duty to consult’ for resource-based developments, a case study of tourism in Northern Ontario.

During the consultation process for this research study, 48 industry partners participated and of these, 79% indicated that their organization supports the development of Indigenous tourism in Ontario. The most common form of support offered by these organizations was facilitating partnerships between ITO and other industry leaders. For detailed findings obtained from industry partners, refer to section 4.3.

Of equal importance as industry partnerships, establishing community support and partnerships with communities throughout the province will be critical to ensure that tourism development proceeds in a clear direction and achieves maximum economic and social benefits. As ITO moves forward, establishing contact in Ontario’s First Nation communities, coordinating tourism efforts and ensuring that communities are aware of ITO’s programs and services will be a top priority.

Marketing

Foundational marketing activities for ITO were completed in 2017 and continue to gather strength, mainly through ITO’s corporate website, the OAIM platform, social media sites and through speaking engagements.

Recently, the transition from Aboriginal Tourism Ontario (ATO) to Indigenous Tourism Ontario (ITO) was completed with a rebrand of the logo, website, banners, documents and social media sites. The ITO logo represents seasonal changes throughout the province and is about having experiences you can taste, touch, see, smell, hear, and ultimately understand enough to take back home with you.

In 2017, ITO’s corporate website was launched to:

- Establish a reputable online presence for the organization
- Attract membership registration
- Promote ITO’s programs, services and initiatives
- Feature Indigenous tourism businesses

In addition to the corporate website, the Ontario Authentic Indigenous Moments (OAIM) website expands ITO’s marketing reach and has its own branding identity. https://ontarioindigenousmoments.ca

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Since its inception, ITO has greatly increased its organizational presence on a provincial and national level. Attendance and public presentations at numerous industry events has established ITO as the leader of Indigenous tourism in Ontario. In 2018, ITO delivered a presentation or was represented at the following events:

- Tourism Toronto Edge Event Series
- First Nation Economic Advancement Conference
- World Tourism Day – Ryerson University
- Ontario Tourism Summit
- Transforming Ontario’s North – A Northern Ontario Leadership Summit
- Showcase Canada Asia in Beijing, China
- International Indigenous Tourism Conference
- Tourism Day at Queens Park
- Experience Qalipu Tourism Forum
- Advancing Indigenous Tourism Conference – Yukon First Nations Culture & Tourism Association
- Algoma Country AGM
- ITAC National Regional Partners Meeting
- Tourism HR Canada Indigenous Consultation session

Conducted over 2 weeks in October and November of 2018, the ITO Regional Workshops for this research study also gained significant awareness amongst Indigenous communities, businesses, organizations, as well as tourism partners. Promotional material was sent to over 500 contacts, encouraging their attendance at the workshops and informing them of ITO’s provincial initiatives.

Looking to the future, there are a number of marketing activities that are recommended for ITO.

Product Development – Ontario Authentic Indigenous Moments

Bringing products to market is perhaps the most critical endeavour facing the Indigenous tourism industry in Canada today. ITO’s primary initiative relating to product development is the Ontario Authentic Indigenous Moments (OAIM) program. The OAIM program is centred upon ‘Cultural Entrepreneurs’ – Indigenous people or organizations who have a cultural experience or ‘moment’ that they would like to share with visitors to their communities. These people do not need to be professional tour guides but are simply passionate about their culture and wish to provide a meaningful, authentic experience.

Moments are any experience based around Indigenous culture. These moments can take many forms, for example: a medicine walk, storytelling, making a birch bark basket, a 5-day guided canoe trip – opportunities are abundant.

The OAIM website and mobile app allows Cultural Entrepreneurs to upload their moments or experiences, which then will be available for tourists to see and purchase. The OAIM model is the first ever provincially dedicated web-based platform that features Indigenous entrepreneurs as guides of authentic cultural experiences. Visitors from Ontario and around the world will be provided with an intimate and meaningful experience that highlights Indigenous cultures in Ontario.
Ontario’s Indigenous Tourism Landscape Foundational Research Study 2019 | CES

The OAiM website and app is revolutionary in the sense that Cultural Entrepreneurs are the leaders of their own tourism business while visitors have the chance to experience authentic Indigenous culture from those who know it best. This innovative business model allows Cultural Entrepreneurs to start providing Indigenous tourism experiences without the hassle of starting their own business; ITO provides all the support required.

Although only in its infancy, the Ontario Authentic Indigenous Moments (OAiM) platform is shaping up to be one of the most innovative and recognizable tourism products ever launched by a provincial Indigenous tourism organization. The website and app have begun to establish a community of authentic Indigenous tourism experiences in Ontario, while strengthening the provincial tourism brand.

In 2017, ITO was able to secure over 30 individuals or organizations who indicated that they would like to join the OAiM program, from whom over 50 moments or experiences could be offered.

Currently, the final stages of website development are being completed and the OAiM website has begun to upload Cultural Entrepreneurs and the moments that they will be offering to tourists.

All required regulatory and operational issues have been considered and have been elaborated upon in the Authentic Indigenous Moments (AIM) operating model.

For cultural entrepreneurs, all information about joining the OAiM program and how it works for those who will be delivering the cultural experiences can be found in the Guidebook for Entrepreneurs.

Training & Capacity Building – Cultural Authenticity Program

ITO is investing in capacity building programs and services, which includes their Cultural Authenticity Program. ITO strives to ensure a triple bottom line approach to tourism development, which addresses authenticity and cultural preservation, environmental responsibility, and financial sustainability.

The Cultural Authenticity Program (CAP), introduced in the 2020 ITO Strategy, supports, recognizes and rewards businesses that offer ‘culturally authentic’ tourism products. CAP’s main objective is to recognize Indigenous cultural entrepreneurs, while increasing awareness among visitors to understand more about the local businesses and what they have to offer in the region. This non-regulating approach recognizes and celebrates Indigenous tourism businesses in all tourism sub-sectors and creates awareness of environmental and cultural diversity while supporting the growth of authentic cultural tourism.

CAP is a recognition program that showcases tourism products and services that are true representations of Indigenous culture. The program is currently facilitated through and online assessment process. The CAP program has 4 designations:

- **Preserver** – Indigenous entrepreneurs and businesses who offer culturally authentic activities based on their traditions, skills and knowledge.
- **Packager** – Businesses that provide a tourism experience, service or product that includes an authentic Indigenous component.
- **Partner** – Organizations, corporations and government bodies that support and/or sponsor authentic Indigenous products and services.
- **Promoter** – Tour operators, RTOs, travel agencies, DMOs, etc. that promote Indigenous tourism products and services.

When an ITO member receives their CAP designation, they will be sent a physical badge/sticker that can be placed on their storefront/office, as well as a digital marketing package to be used for their website and social media sites.
Organizational Budget & Funding
In 2018, ITO received a total of $165,000 in organizational funding from the Ministry of Tourism, Culture and Sport ($100,000) and ITAC ($65,000).

In order to properly support Indigenous tourism development in Canada, it is recommended that government funding be at least 1% of a particular province’s contribution to the GDP. For example, Indigenous tourism in Ontario contributes $622,079,198 to the GDP (basic prices), therefore government funding to its provincial Indigenous tourism organization should be $6.2 M.

Because ITO’s 2020 Strategic Plan was not fully implemented and not fully financially supported, ITO’s Board approved a Critical Path for 2018-19 in order to get ITO in line with important initiatives and requirements of properly launching ITO.

Currently, Kevin Eshkawkogan and ITO have engaged in various meetings with the Honourable Minister Michael Tibollo as well as TIAO to strategically assess how Indigenous tourism can be properly supported in Ontario, specifically ITO.

ITO Funding Required

<table>
<thead>
<tr>
<th>2020 Key Initiatives</th>
<th>2019/2020</th>
<th>2020/2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transition and Launch of ITO Operation</td>
<td>$732,000</td>
<td>$727,000</td>
</tr>
<tr>
<td>Focus on ITO Rebrand &amp; New Marketing Efforts</td>
<td>$576,000</td>
<td>$430,000</td>
</tr>
<tr>
<td>Promote and Deliver Capacity Building Programs and Services</td>
<td>$240,000</td>
<td>$636,000</td>
</tr>
<tr>
<td>Implement and Develop the Authentic Indigenous Moments Program (AIM)</td>
<td>$262,000</td>
<td>$125,000</td>
</tr>
<tr>
<td>Develop Regional and Provincial Partnerships</td>
<td>$190,000</td>
<td>$160,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$2,000,000</td>
<td>$2,078,000</td>
</tr>
</tbody>
</table>

Source: Canadian Ecotourism Services

2.2 Environmental Scan – Forces Shaping the Future of Indigenous Tourism in Ontario

The purpose of this environmental scan is to provide a broad overview of some of the external factors affecting the future of Indigenous tourism in Ontario. The findings are derived from secondary literature sources. The scan is designed to establish a context for growing ITO as an organization and supporting the communities and members that it represents. The goal of this section is to:

- Better understand the nature and pace of change in the external environment, and
- Identify potential opportunities, challenges and likely future developments relevant to ITO and the Indigenous tourism landscape

This section starts by delineating the importance of Indigenous tourism as a global phenomenon and then goes on to describe the factors that will influence how the Indigenous tourism industry develops in the coming years.

These factors include:

- Globalization
- A Vulnerable Economy
- Ontario’s Tourism Gap
- The Digital Transformation
- Changing Demographics

Importance of Indigenous Tourism

There has never been a greater need for a deep understanding of Indigenous culture, than now. As we move forward into an uncertain future, our global society could benefit greatly from traditional Indigenous knowledge and worldviews. Quite possibly the most pressing concern facing our civilization is our lack of connection with the earth which sustains us. Climate change, political instability and economic inequality are very real challenges of which our societies will soon feel the profound impacts.

Although Indigenous tourism is not commonly considered as a solution for the world’s problems, it does have the capacity to transform historical stereotypes and promote a much more ecocentric understanding of the world. These are some of the philosophical implications of Indigenous tourism.

The socio-cultural benefits that result from Indigenous tourism are also quite significant. Since First Contact with Europeans, Indigenous Peoples have been subjected to a systematic cultural genocide which has resulted in extremely damaging social effects on our country’s First Nations.
The growth in Indigenous tourism that we are currently experiencing can be seen as a cultural revival and a form of preservation of traditions, beliefs and values. By sharing Indigenous stories and ways of life, we are only gathering strength and reasserting the importance of Indigenous peoples in Canada. It is impossible to touch on all the socio-cultural benefits associated with growing Indigenous tourism, although almost all of them are positive.

The potential economic benefits for Indigenous communities are undeniable. Indigenous tourism creates an opportunity for community economic development while maintaining social values and cultural traditions. Governments across Canada have recently begun to recognize the substantial socio-economic benefits associated with Indigenous tourism and its implications for supporting communities. The World Tourism Organization (UNWTO) has acknowledged the importance of this industry, stating:

‘As one of the most thriving economic activities, tourism is well placed to contribute to Indigenous people in improving their livelihoods. If managed responsibly and sustainably, Indigenous tourism can spur cultural interaction and revival, bolster employment, alleviate poverty, curb rural flight migration, empower women and youth, encourage product diversification, and nurture a sense of pride amongst Indigenous people.’

Globalization

The effects of globalization have encroached on every aspect of our lives and will continue to influence our consumer habits, our leisure activities and the ways in which we interpret or engage in cultural expression. Indigenous tourism will continue to be intricately shaped by the interconnectivity and interdependence of our global economies.

Globalization may be considered as a double-edged sword when we talk about Indigenous tourism. On one hand, it allows Indigenous tourism operators to reach a wide market with a potential for high return and foreign investment.

On the other hand, when we consider the historical impacts of globalization on Indigenous communities, ‘tourism’s supposed benefits (generation of employment, development of infrastructure, etc.) have not trickled down or benefited Indigenous peoples. Dependency on tourism also leaves Indigenous communities in a volatile position, as the tourism industry is highly dependent on local, national and global economic fluctuations.’ Lastly, as globalization intensifies, the demand for natural resources (which are often sought after on Indigenous territories) will also grow, threatening the most integral aspect of Indigenous culture, the land.

Needless to say, the positive and negative effects of globalization will need to be balanced as Indigenous tourism in Ontario continues to grow.

A Vulnerable Economy

As reported by the Ontario Chamber of Commerce, low business confidence and a climate that discourages growth have exposed a serious vulnerability in the Ontario economy. In the 2018 Ontario Economic Report, the following information was learned:

- Ontario businesses have begun to lose confidence in their own economic outlook
- Almost two thirds of businesses cite input costs for their lack of confidence
- One quarter of small businesses in Ontario predict declining revenue in 2018
- The production of goods and services represent a shrinking contributor to business prosperity – prosperity is increasingly becoming more dependent on financial activities rather than productive activities, creating a higher-risk operating environment for business
- The share of Ontarians not in the labour force continues to rise, highlighting one of the ways in which Ontario’s economy is structurally changing

As a result of the above factors, there is reason to believe that the Ontario economy will weaken and will see stagnation in 2019.

When looking to long-term predictions in Ontario, economic prospects are mixed, but report similar prospects as described above. Ontario’s Long-Term Report on the Economy reports the following:

- Ontario economic growth is expected to be somewhat slower than in the past, primarily due to slower growth in the working-age population
- Labour productivity growth is a key driver of Ontario’s prosperity and is projected to continue to grow at its long-term historical pace
- The structure of Ontario’s economy will continue to shift from goods-producing to service-producing sectors
- Ontario exporters face challenging global competition, but fast-growing emerging markets present new opportunities for growth

Canadian Ecotourism Services (CES) © 2019 Report
As mentioned above, labour productivity is a key economic driver for Ontario. When looking to the employment share of major Ontario sectors, it is clear that jobs affiliated with Indigenous tourism are positively positioned to take advantage of economic growth.

<table>
<thead>
<tr>
<th>Sector</th>
<th>1996</th>
<th>2006</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goods-Producing Sector</td>
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<td>24.6</td>
<td>20.3</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>17.5</td>
<td>15.4</td>
<td>10.7</td>
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<tr>
<td>Other Goods-Producing Industries</td>
<td>8.9</td>
<td>8.1</td>
<td>9.5</td>
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<tr>
<td>Private Services-Producing Sector</td>
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<td>53.8</td>
<td>55.5</td>
</tr>
<tr>
<td>Wholesale and Retail Trade</td>
<td>15.0</td>
<td>15.7</td>
<td>14.8</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>4.7</td>
<td>4.6</td>
<td>4.7</td>
</tr>
<tr>
<td>Information and Cultural</td>
<td>2.7</td>
<td>2.7</td>
<td>2.1</td>
</tr>
<tr>
<td>Financial Services</td>
<td>5.2</td>
<td>5.4</td>
<td>5.8</td>
</tr>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>2.0</td>
<td>1.9</td>
<td>2.1</td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>6.1</td>
<td>7.0</td>
<td>8.5</td>
</tr>
<tr>
<td>Management, Administrative and Support</td>
<td>3.4</td>
<td>4.5</td>
<td>4.7</td>
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<tr>
<td>Arts, Entertainment and Recreation</td>
<td>1.8</td>
<td>2.2</td>
<td>2.4</td>
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<tr>
<td>Accommodation and Food Services</td>
<td>6.0</td>
<td>5.8</td>
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<tr>
<td>Other Services</td>
<td>4.7</td>
<td>4.0</td>
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<tr>
<td>Public-Sector Services</td>
<td>21.9</td>
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<tr>
<td>Education</td>
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<td>7.2</td>
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<tr>
<td>Health Care and Social Assistance</td>
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<td>9.8</td>
<td>12.0</td>
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<tr>
<td>Public Administration</td>
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<td>4.8</td>
<td>5.0</td>
</tr>
</tbody>
</table>

Sectors encompassing Indigenous tourism such as Accommodation and Food Services and Arts, Entertainment and Recreation have seen growth over the past 20 years. However, the Information and Culture sector has seen a decrease in its employment share. Together these 3 sectors encompass 11% of Ontario’s employment.\textsuperscript{xx}

Since the Ford PC Government was elected, there have been funding cuts to core programs influencing Indigenous tourism in Ontario. In 2018, the Ontario government cut core base funding to the Ontario Arts Council, including $2.75 million to the Indigenous Culture Fund. Some feel that this is an attack on Indigenous reconciliation.\textsuperscript{xxi}

Ontario’s vulnerable economy, along with cuts to Indigenous cultural programs in the province are a few examples of how the Indigenous tourism industry could be affected in the coming years.
As a result of identifying this tourism gap, a set of recommendations were developed to help address and close the gap:

1. Engage in strategic and evidence-based planning
   - Develop a government-wide Ontario tourism strategy with measurable targets
   - Work with relevant partners to improve the timelines of tourism data dissemination, specifically related to visitor spending, as well as the scope of available tourism data
   - Work with industry to more clearly define the roles and responsibilities of the province’s tourism organizations

2. Improve the tourism business environment
   - Work with tourism operators to reduce regulatory and cost burdens, and add tourism to the Red Tape Challenge –
   - Support industry efforts to address the labour shortage by prioritizing workforce development.

3. Enhance visitor access to tourism attractions
   - Incorporate tourism considerations into provincial infrastructure investments
   - Improve Ontario’s air travel cost competitiveness by reducing the aviation fuel tax
   - Leverage the potential of the sharing economy to expand tourism by promoting consistent, easy-to-follow rules across Ontario

4. Support tourism marketing
   - Create greater consistency and predictability in provincial tourism marketing funding by moving to a multi-year funding model

If the above recommendations are acted upon, it could mean huge improvements in Ontario’s tourism operating environment, resulting in an increase in international tourist arrivals. If the government decides not to act upon these recommendations and maintain the status quo for the tourism industry, Indigenous operators and businesses can expect that the majority of their potential market will continue to be domestic tourists without an increase in international visitors.

Source: Ontario Chamber of Commerce

If the above recommendations are acted upon, it could mean huge improvements in Ontario’s tourism operating environment, resulting in an increase in international tourist arrivals. If the government decides not to act upon these recommendations and maintain the status quo for the tourism industry, Indigenous operators and businesses can expect that the majority of their potential market will continue to be domestic tourists without an increase in international visitors.
The Digital Transformation

It is now common knowledge that technology and the digital revolution are the primary forces driving the global tourism industry. From research to booking to executing their travel plans, the vast majority of tourists utilize online resources and rely on their mobile devices. Indigenous tourism in Canada will only succeed if it adopts a solid strategy for integrating digital technology into every aspect of the industry while respecting and following traditions.

The most powerful value proposition that Indigenous tourism has to offer is an authentic cultural experience which can only be sparked by face-to-face encounters and experiential learning. Nonetheless, technology is a powerful tool that can be used to facilitate and expedite these experiences.

Immersive connectivity means technology that seamlessly permeates a traveller’s experience without making the device or medium feel like a burden (e.g. smartphone). Apps that enhance a traveller’s experience, virtual reality and augmented reality are just a few examples of this trend.

Machine learning is also a powerful tool and trend that will influence the Indigenous tourism industry. Machine learning means that computers don’t have to be told exactly what to do, but rather they are given an objective and data and then teach themselves how best to achieve the objective. An example of this is using data analytics in digital marketing that determine a tourist’s path when using a website. This information will be increasingly important for Destination Marketing Organizations (DMO).

Changing Demographics

There are a number of demographical changes occurring in Ontario that may have a profound effect on Indigenous tourism in the province.

Ontario is home to over 300,000 First Nation, Métis and Inuit people, which is more than any other province or territory. Indigenous populations in Ontario increased by almost 58% between 2001 and 2011. Over the next 15 years, Indigenous people could make up over 10% of the total populations of Thunder Bay and Greater Sudbury.

The Indigenous population in Canada is growing at a rapid rate; in 2016 the Indigenous population had grown 42.5% since 2006. This is most likely due to the increased willingness of Indigenous peoples to identify as Indigenous, as well as due to natural growth.

The number of First Nations, Métis and Inuit Ontarians living in cities is rising sharply. As urban populations as a whole are rising, rural and small-town populations are shrinking. The role of culture and tourism revitalizing communities may be important for remote or rural communities facing population decline.

Another notable demographical change is the prevalence of younger generations. About 18% of Ontario’s overall population is between the ages of 12 and 25 years old. Youth also make up a significant portion of Indigenous populations in Ontario; in 2016, 32.5% of the Indigenous population was under 19 years old.

For a useful environmental scan from the Ontario Tourism Marketing Partnership Corporation (OTMPC), refer to appendix A.
2.3 Indigenous Tourism Key Trends & Industry Research

The following section details some of the most prominent industry trends and research relating to Indigenous tourism in Canada. Findings were compiled by means of informal conversations with a variety of Indigenous tourism stakeholders during the ITO regional workshop tour as well as at other local, provincial and national industry events. Additional findings were acquired by means of secondary research and are cited throughout the section. Key trends explored in this section include:

- Growth in Indigenous Tourism in Canada
- Grassroots Tourism Development & Cultural Planning
- Tourism Marketing Trends

Growth in Indigenous Tourism in Canada

In 2018, the substantial growth of Indigenous tourism in Canada was a hot topic on the national tourism stage. It is reasonable to predict that Indigenous tourism will continue to grow in the coming years: attracting new markets, increased product development, increased support services for Indigenous tourism businesses and entrepreneurs and more.

In early 2019, the Conference Board of Canada and ITAC released a draft report of their most recent insights of the economic impact of Indigenous tourism in Canada. It was determined that 1,875 Indigenous businesses participate in Canada’s Indigenous tourism with over 39,000 people working in the sector’s associated industries. Considering much of this employment is seasonal, Indigenous tourism contributes the equivalent of just under 31,500 full-year jobs to the Canadian economy. ‘The combined direct economic footprint of Indigenous tourism in 2017 is estimated to exceed $1.7B in GDP.’ Based on a high-level comparison of ITAC’s previous 2014 employment and GDP estimates, the Indigenous tourism sector has substantially outpaced the growth of that of the overall tourism sector for the period of 2014-17.¹

In late 2018, ITAC completed a review of its current 5-year strategic plan and the results were extremely positive. Only 3 years into its strategy, the national Indigenous tourism organization had already achieved its overall targets in terms of industry growth. Key areas of growth are as follows: xxvii

- Current Indigenous tourism revenues in annual Canadian GDP: $1.8 billion (an increase of $400 million since 2015)
- Current Indigenous tourism jobs: 41,153 (an increase of 8,053 since 2015)
- Current number of export-ready Indigenous tourism experiences: 139 (an increase of 59 since 2015)

The demand for Indigenous tourism experiences has also increased significantly, exceeding expectations as more international visitors are seeking authentic experiences.

- 1 in 3 international visitors to Canada are interested in Indigenous tourism experiences
- Visitors from France (63%) and Germany (47%) are most likely to be interested in Indigenous tourism experiences
- The USA (33% interest) and China (35% interest) offer the largest potential market opportunities in terms of potential visitation

The number of online conversations about Indigenous tourism in Canada also grew substantially, indicating the prevalence of the industry in online media sites, forums, reviews and social media networks.

Indigenous tourism online conversations driven by ITAC have grown 5x over the past 2 years. There were 1000 mentions from July 1st, 2015 to June 30, 2016 to over 5000 mentions during the same months of 2017 to 2018.”xxviii

Grassroots Indigenous Tourism Development & Cultural Planning

The emergence of grassroots tourism development in Indigenous communities is becoming more and more prevalent throughout Ontario. Community leaders and entrepreneurs are beginning to see the huge potential that Indigenous tourism holds as a way to preserve and strengthen culture and to encourage socio-economic growth.

Throughout history, grassroots movements have always been a defining characteristic amongst Indigenous cultures. Many (if not all) of the notable historical events involving Indigenous rights have begun at the grassroots level. For this reason, we are seeing a trend of communities that wish to develop their tourism resources and assets from the ground up and using their own protocols. Creating products and services that fit into this model will be key in the coming years. This also helps with ensuring authenticity amongst Indigenous tourism experiences, as the products are developed by the cultural entrepreneurs and knowledge keepers themselves.
To complement the trend of grassroots tourism development, communities and municipalities are recognizing the contribution of culture to sense of place, quality of life and community and economic prosperity through a process called ‘cultural planning’. Led by local governments, cultural planning involves community engagement to identify and leverage a community’s cultural resources, strengthen them, and integrate them into local planning and decision-making. We are also seeing this as a global trend toward more place-based approaches to planning and development that highlight the pillars of:

- Economic prosperity
- Social equity
- Environmental responsibility
- Cultural vitality

Tourism Marketing Trends

It will be critical for ITO to be aware of and well-versed in the various shifting market trends that affect the industry. Upon research, a few prominent marketing trends have emerged including: the new tendencies of digital marketing, China as a key potential market for Canada and lastly, trends in millennial travel consumption. These themes are explored below.

Trends in Digital Marketing:

It is now common knowledge that that vast majority of consumers research, book and execute their travel plans online, much of this taking place on a smartphone. A destination’s ability to adapt and thrive in the digital marketing landscape will determine its success. However, within digital marketing, there has been a noticeable shift from mass marketing to personalized outreach efforts, particularly when it comes to tourism. Relationship marketing is now more important than ever for building long-term engagement and trust with consumers, which is regarded as the key to driving visitation to a destination.

Destination Canada is putting this trend into action, stating that:

We will take a consumer-centric approach to focus on passions that are emotion-focused and interests that are activity-focused. Showcasing areas such as music, culinary, arts, culture, outdoor adventure, LGBTQ2, and Indigenous tourism will help to grow the seasonal opportunity for tourism businesses.

Personalized marketing requires having the access to mass amounts of data which can inform the decisions that companies and organizations make. Sophisticated analytics which are interpreted in reports reveal the patterns and trends in consumer behaviour. This will shed light on which consumer demographics to target, when, and through which channels.

Hyper-connectivity reveals another notable trend. Consumers are often toggling through various sources to research and purchase their travel; using multi-channels to reach the consumer is now becoming more and more common. Although marketing through multiple digital channels is recommended for destinations, reducing the complexity of the decision to visit a destination is key; the decision and path to purchase should be easy.

China as a Large Potential Market:

2018 was determined as the Canada-China year of tourism and there continues to be huge visitation growth potential from the Chinese market. China continues to be the world’s number 1 source market for outbound travel and leads as the world’s top spender on international travel. Canada has seen significant growth from this market over the past few years.

![Image Credit: ITAC](image_url)
Canada is now boosting its marketing presence in China, which also applies to Indigenous tourism. ITAC attended a trade mission in June of 2018 where an MOU was signed with CYTS Sparkle Tour to promote Indigenous tourism experiences in the Chinese luxury travel market. xxx ITAC also attended Showcase Canada Asia where Indigenous tourism experiences were at the forefront. xxxi

Looking ahead, 10.9 million Chinese long-haul pleasure travellers intend on visiting Canada in the next 2 years. Ontario is extremely well positioned as the Chinese traveller is most interested in visiting Ontario compared to any other region in Canada. xxxii

Due to recent political tensions and travel advisories, Canada’s tourism relationship with Canada has been weakened which will have an uncertain impact on this important market for Indigenous tourism.

Millennial Travel Consumption:

Millennials continue to make their mark on the travel industry and are regarded by many as a key segment of tourism growth. Over the past few years, there has been a rise in millennials travelling abroad. They are tech-savvy and often seek experiences off the beaten path. Interest in soft adventure travel products, along with customized experiences. Destination Canada is hoping to appeal to this younger generation of high-value travellers to drive more off season and off the beaten path travel to lesser-known and frequented destinations.

Destination Canada’s recent *Millennial Travel Program* intended on breaking perceptions and encouraging Canadian millennials to choose to travel within their own country instead of abroad. Not only is the size of the millennial market enticing, but it influences Canada’s entire tourism industry:

- Millennials often spend more in destinations than other tourists because they travel for longer periods
- Millennials travel more frequently and off the beaten track
- Millennials are likely to return to the destination over their lifetime
- Millennials are pioneer travellers who discover and promote destinations not yet visited by traditional tourists
- Millennials play an important role in the tourism landscape and image of destinations
- Millennials are instigators of travel trends and thrive on influencing others
- Millennials are at the cutting edge of technology and are more connected than any other age group making them more likely to use technology to make recommendations
- Millennials value travel as an essential aspect of their lives.
Millennials globally tend to travel with a purpose and are often drawn by 1 of 3 things: social hubs, physical challenges, or learning and development.\textsuperscript{xxxiv}

**Purpose for Travel**

\textit{Image Credit: Destination Canada}
3.0 Indigenous Tourism Jurisdictional Scan

The purpose of this jurisdictional scan is to provide a broad overview of the various provincial/territorial Indigenous tourism organizations operating throughout the country. The most prominent organizations (or communities where a provincial organization does not exist) have been highlighted, representing each of their respective provinces and territories. Upon review of the different jurisdictions, ITO hopes to gain better insight into how it can operate most effectively, offering the greatest return for its members and the provincial tourism economy.

Between the dates of November 9 and December 19, 2018, the following individuals were reached via telephone to answer questions about their province/territory’s Indigenous tourism organization or strategy:

- Henry Tso - Chief Financial Officer, ITBC
- Tracey Pascal - ITAC Regional Coordinator, Saskatchewan
- Ryan Duplassie - ITAC Regional Coordinator, Manitoba
- Sarah Myers & Jamie Thomas – Cultural & Tourism Coordinator, Lennox Island Mi’kmaq First Nation, PEI
- Tara Saunders – Tourism Development Officer, Qalipu First Nation & ITAC Board of Directors, Newfoundland & Labrador
- Ron Ostrom - ITAC Regional Coordinator, North
- Caili Steele – Tourism Development Officer, Yukon First Nation Culture & Tourism Association

For the organizations where the research team was unable to coordinate a phone interview with the provincial leader, the team relied on public information. It should be noted that this information may require updating.

Note that in the case that a province or territory does not have a formally established Indigenous Tourism Association, key representative organizations were highlighted to provide an overview of the state of Indigenous tourism in that province/territory.

3.1 Indigenous Tourism: An Overview of Canadian Jurisdictions

3.1.1 British Columbia
Organizational Strategy

Indigenous Tourism BC (ITBC) is the provincial organization representing and supporting Indigenous tourism development in British Columbia. ITBC may very well be Canada’s most successful Indigenous tourism organization and a best practice for ITO to learn from. ITBC has been in existence for over 20 years and is recognized by the First Nations Leadership Council as the official representative of the Indigenous tourism sector in BC. ITBC’s mission is as follows:

To advance a competitive and socially conscious Indigenous tourism industry while contributing to cultural understanding and economic prosperity.

ITBC as an organization is built around 4 pillars and strategic performance areas:

- Marketing
- Experience Development
- Partnerships & Special Projects
- Leadership & Organizational Excellence

Each of these pillars guide ITBC’s day-to-day activities and long-term organizational strategy, elaborated on below.

Developed in 2005, the Aboriginal Cultural Tourism Blueprint Strategy for BC is the foundational guiding document of ITBC, on which the organization’s current 5-year strategies are still based. This was the initial work that was completed that laid out a roadmap for what ITBC would eventually become and provided research data to grow the sector as a whole. As a result of this strategy, ITBC was able to secure crucial provincial and federal funding.
Since the completion of the Blueprint Strategy, ITBC has completed 3 rounds of 5-year Corporate Plans, which are subsequently followed up with annual Indigenous Tourism Action Plans. Currently ITBC is only in its 2nd year of their 5-year Corporate Plan and has already surpassed 80% of the plan’s overall targets. This requires a revision which ITBC completes with its partners, particularly Destination BC in order to align with the province’s overall tourism strategy.

One of ITBC’s foundational pillars is ‘leadership and organizational excellence’; focusing on this allows the organization to achieve its goals and fulfill its values. “For the past two decades, ITBC has been providing leadership and advocacy on government policy and regulation, business issues, marketing opportunities, product development, skills training and more.” Much of ITBC’s work focuses on advocating on behalf of the Indigenous tourism industry to ensure the right economic, social and environmental conditions are in place to sustainably grow Indigenous tourism. Another element of being a leader in the industry is organizational presence at key events and locations demonstrating ITBC’s commitment to advocating for and growing Indigenous tourism on provincial, national and international scale.

ITBC’s organizational excellence is attributed to its ability to achieve its goals and strategy. ITBC is unique only to Destination Canada and Destination BC in that it uses an approach for performance measurement called the PuMP Strategy. This approach encourages the establishment of key performance indicators (KPIs) that are relevant and work backwards to determine the tactics required to achieve the desired results.

From a human resources standpoint, ITBC runs a fairly lean team with only 8-9 core employees and some additional consultants/contractors from time to time.

ITBC’s membership structure is described below:

<table>
<thead>
<tr>
<th>Organization</th>
<th># of Membership Tiers</th>
<th>Membership Categories (Non-Indigenous)</th>
<th>Requirements for Voting Status</th>
<th>Membership Fees</th>
<th>Membership Product Offerings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indigenous Tourism BC</td>
<td>5</td>
<td>1. Conceptual/Start-Up Phase (Non-Voting)</td>
<td>- Market-Ready or Export-Ready</td>
<td>599</td>
<td>- Promotion on ITBC’s consumer &amp; travel trade website with separate listings for each experience type offered and including a link to your business website.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Visitor Ready Business or Experience (Non-Voting)</td>
<td>- Minimum 52% Indigenous owned or controlled</td>
<td></td>
<td>- Promotion in ITBC’s regional print brochures.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Market Ready Business or Experience (Voting)</td>
<td>- Minimum 12 months participation in an ITBC Marketing Program</td>
<td></td>
<td>- Participation in Domestic Travel Trade, Media and FAM Tours.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Export Ready Business or Experience (Voting)</td>
<td></td>
<td></td>
<td>- Promotion at special events such as the Victoria Aboriginal Cultural Festival.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Honorary &amp; Associate Stakeholders (Non-Voting)</td>
<td></td>
<td></td>
<td>- Market Ready Stakeholders gain voting privileges within the Association after 12 months of participation in an ITBC Marketing Program.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- Participate in International Travel Trade, Media and FAM Tours.</td>
</tr>
</tbody>
</table>

Source: Ontario Chamber of Commerce
Industry Partnerships & Collaborations

Strategic partnerships are essential to ITBC’s success as an organization which is why ‘partnerships and special projects’ is one of their organizational pillars. One of ITBC’s most important partnerships is with Destination BC, with whom they have a long-term funding agreement and a healthy working relationship that encourages collaboration and strategy alignment. The partnership with Destination BC is also strategic in the sense that it helps to leverage additional federal funding.

Another key partnership is with the provincial Ministry of Tourism who also provide some funding to the ITBC. It is important to establish a strong relationship with the Ministry to ensure that Indigenous tourism development is a government priority and not just an after-thought.

The First Nation Leadership Council of BC is an important partner as well; due to a series of mandate letters that were established, ITBC is the official body representing Indigenous tourism in BC on behalf of all Indigenous communities.

Some of ITBC’s key initiatives relating to building partnerships are:

- Pursue partnerships that directly support ITBC core values and contribute directly to stakeholder development
- Negotiate federal and provincial partnerships that lead to multi-year funding, adding certainty and sustainability to ITBC operations
- Develop and implement MOUs with key Indigenous and non-Indigenous organizations to enhance program delivery to a wider stakeholder base
- Develop sustainable tourism-related business opportunities that will generate program revenue for ITBC
Product Development

One of ITBC’s strategic pillars and key focus areas is experience development. As stated from ITBC’s 2017-19 Tourism Action Plan, ‘Helping committed ITBC marketing stakeholders improve the experiences they provide will help BC stand out in the marketplace and leave visitors feeling emotionally fulfilled in ways that few experiences can... Given that global demand for Indigenous cultural tourism products is outpacing supply, it is paramount that Indigenous communities become more engaged in fostering the growth of authentic Indigenous experiences in their territories.’

Currently there are 101 market ready authentic Indigenous tourism products that can be promoted within BC. ITBC has developed a tier system to classify the 3 development stages for Indigenous tourism products:

- **Tier 1: Start-Up Product Stage** — tourism businesses, potential start-ups and product are undeveloped but have an interest in exploring cultural tourism as an economic development activity.
- **Tier 2: Existing but Not Market Ready Product** — Indigenous businesses are operating but do not have market ready products and there are clear gaps in industry standards, hospitality and service levels.
- **Tier 3: Market Ready** — tourism products that satisfy market ready standards and should be fully integrated into local, regional and provincial destination marketing programs.

For each of the 3 tiers, ITBC recommends a series of programs that will strengthen and spur the growth of the Indigenous tourism industry, and that are tailored to each tier’s specific needs. Below is an outline of key product development support initiatives according the needs of the 3 tiers:

<table>
<thead>
<tr>
<th>Start-up products (undeveloped)</th>
<th>Existing, but not market ready products</th>
<th>Market ready products</th>
</tr>
</thead>
<tbody>
<tr>
<td>• New product development programs including coaching, business planning and financial facilitation</td>
<td>• Facilitation of operators to access existing programs</td>
<td>• Integrated with TBC, regional tourism associations, Canadian Tourism Commission, Vancouver Organizing Committee for the 2010 Winter Games</td>
</tr>
<tr>
<td>• Community awareness</td>
<td>• Providing appropriate training, business planning, market management and operations support</td>
<td>• Branding/positioning consistently applied by above partners</td>
</tr>
<tr>
<td>• Community development</td>
<td>• Financial programs</td>
<td>• Cultural protection mechanisms in place</td>
</tr>
<tr>
<td>• Mentoring</td>
<td>• Mentoring services</td>
<td>• Facilitating marketing</td>
</tr>
<tr>
<td>• Financing</td>
<td>• Web resources</td>
<td>• Branding</td>
</tr>
</tbody>
</table>

*Source: Indigenous Tourism BC*
For a while, ITBC focused heavily on marketing Indigenous experiences, but has now initiated a shift towards experience development which includes coaching, capacity building and making businesses remarkable. ITBC has partnered with Destination BC in its *Remarkable Experience Program*, a hands-on collaborative workshop facilitated by leading industry mentors with coaching, access to traveller research, the opportunity to connect with other local operators and the tools to elevate products and online presence.

ITBC’s key initiatives for experience/product development in 2017-18 were as follows:

**Strategy 1: Regional Approach**
- Accelerate regional Indigenous tourism development in key corridors by embedding regional tourism specialists into high potential tourism regions to improve Indigenous community collaboration/support to increase the number of tier 1 and tier 2 stakeholders.

**Strategy 2: Training & Capacity Building**
- Assist in development of tier 1 (start-up) businesses to move them towards tier 2 (visitor ready) by utilizing ITBC’s Community Support/Cultural Sharing programs to build capacity and understanding about the tourism industry to Chief and Councils, local EDOs and Indigenous entrepreneurs to support businesses along the development path towards visitor-readiness.

**Strategy 3: Push for Market Readiness**
- Provide tier 2 (visitor ready) experiences with training to meet tier 3 (market ready) criteria by partnering with regional DMOs and tourism industry providers to build remarkable experiences with Indigenous communities and entrepreneurs to increase the number of businesses that transition as market-ready products.

**Strategy 4: Destination Development**
- Support Destination BC’s *Destination Development* process to ensure that ITBC and Indigenous communities are participating in planning area sessions so that Indigenous economic development opportunities and needs are fully considered in the long-term destination development strategy.

**Marketing**

Strategic marketing of Indigenous tourism is a huge component of what ITBC does. Currently about 50% of ITBC’s marketing efforts are targeted towards promoting market-ready products and services, and 50% of their efforts are targeted towards building ITBC’s membership of Indigenous tourism stakeholders. ITBC’s marketing budget is approximately $450,000 annually.

Effective marketing is a priority for ITBC and the current focus is on the organization’s digital marketing strategy of BC’s Indigenous tourism experiences. Current efforts include content development and curating digital storytelling. The organization is also investing in virtual Indigenous tourism kiosks that utilize AR and VR technology, as well as the development of mobile apps.

‘Technology and distribution channels able to carry the Indigenous cultural tourism message will constantly change, but by staying true to our own stories and learning how to tell them in digital formats, ITBC can turn its online followers into powerful advocates.’

– ITBC Corporate Plan 2017-2022

ITBC’s digital marketing activities also include revamping the current consumer website as well as the corporate website and creating a member portal. ITBC will also be piggybacking off of Destination BC’s Customer Relationship Management (CRM) system which tracks website usage pathways and data analytics to develop effective marketing systems.

Traditional marketing campaigns are also important for ITBC such as working with travel trade and travel media (bloggers and influencers) and attending travel trade events. The importance of having a good marketing campaign was highlighted by ITBC with its past ‘plus Aboriginal’ campaign which suggested to consumers that their vacation won’t be complete until an Indigenous experience was added, encouraging tourists to do just that.
Below is a summary of ITBC’s key marketing initiatives for 2017-18:

**Strategy 1: Tourism Research**
- Identify highest priority markets, target audiences and channels using insights from best available data sources and partners so that ITBC, marketing stakeholders and marketing partners can inspire more of our consumer target market.

**Strategy 2: Consumer Position**
- Develop and promote a compelling consumer position using social listening, guest feedback and market research to inform ITBC content creation and curation so we inspire more of our consumer target market.

**Strategy 3: Marketing Campaign Approach**
- Deliver a customized marketing approach that is more tailored to ITBC’s different marketing stakeholder experiences by delivering 2 different marketing programs that target consumers looking for Indigenous experiences or are pursuing specific interests.

**Strategy 4: Content Sourcing & Distribution**
- Convey the power of the BC Indigenous tourism experience by creating and curating emotional stories that get packaged in preferred formats and distributed through content networks and event platforms, such as Destination BC, that provide the greatest reach or impact.

**Strategy 5: Travel Trade**
- Provide tier 3 (market-ready) experience with training to meet tier 4 (export-ready) criteria by working in partnership with key reception tour operators (RTOs) to inform market-ready businesses about the benefits and requirement of working with travel trade to have more export-ready experiences contract with RTOs.

**Strategy 6: Provide Leisure & Corporate Travel Services**
- Operate Aboriginal Travel Services (ATS), a wholly-owned subsidiary of ITBC, so it can provide leisure and corporate travel services to target consumers and businesses travellers in order to diversify the ITBC funding base and reinvest profits into its Indigenous tourism programs and services.

**Training & Capacity Building**
Building capacity within the industry is one of ITBC’s core organizational values which goes hand-in-hand with experience development. ‘Indeed, in order to develop more ‘market ready’ authentic Indigenous cultural experiences, it is essential that programs be made available that address a wide range of needs and levels of market readiness.’

ITBC offers 12 different capacity building programs aimed at assisting entrepreneurs, communities and individuals:
- Exploring the Potential of Indigenous Cultural Tourism for your Community
- Building Community Support for Indigenous Cultural Tourism
- Establishing Cultural Sharing Protocols
- Establishing an Entrepreneurial Business
- Feasibility Analysis
- Business Planning
- Skills Development for Entrepreneurs
- On Call Support for New and Existing Businesses
- Introduction to Indigenous Cultural Tourism Career Opportunities
- First Host Front Line Service Training
- Cultural Interpretation Training
- Building Your Resume

The 3 most popular of ITBC’s training programs are: the Cultural Interpretation Training, a 10-day program working with Elders and youth to identify and develop cultural tourism assets and get community buy-in; Community Tourism Engagement Session, a 1-day program which emphasizes the value of tourism for Indigenous communities and; the First Host Front Line Service Training, provided through Destination BC with an additional component, ‘First Hosts’, specifically geared towards Indigenous operators.
Organizational Budget & Funding

As of November of 2018, it was reported that ITBC received approximately $2.5 million in funding, 50% of which comes from provincial sources and 50% of which comes from federal sources.

However, the funding received is not sufficient to fully support the needs of the organization. Currently ITBC receives the same amount of funding as one of BC’s regional DMOs (6 in total), but ITBC is responsible for representing the entire province and its Indigenous tourism assets, not just 1 region. ITBC is currently underfunded by about half a million to $1 million. Acquiring proper funding has been a struggle as there are multiple places to apply and often ITBC isn’t able to satisfy all funding requirements. However, ITBC is grateful to have been able to secure some multi-year funding agreements.

ITBC’s 2017-18 budget reported the following funding sources (revenue):

- Destination BC - $1,000,000
- INAC (Strategic Partnerships Initiative) - $275,000
- INAC (BC) - $200,000
- Western Economic Diversification - $610,000
- ITAC - $65,000
- Other - $1,500

Total: $2,151,500

The breakdown of ITBC’s organizational spending by category are as follows (expenditures):

- Marketing - $690,000
- Experience Development - $450,000
- Partnerships & Special Projects - $100,000
- Leadership & Organizational Excellence - $156,500
- Administration & Program Management - $755,000

<table>
<thead>
<tr>
<th>Western Provinces</th>
<th>Name of Representing Organization</th>
<th>BC Core Funding</th>
<th>ITBC Core Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
<td>$2,151,500</td>
<td>$2,151,500</td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to GDP**</td>
<td>$260,274,700</td>
<td>$260,274,700</td>
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</tr>
<tr>
<td>Funding as a Percentage of Provincial GDP*</td>
<td>0.83%</td>
<td>0.83%</td>
<td></td>
</tr>
<tr>
<td>Number of Employees*</td>
<td>9</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to Employment*</td>
<td>5,137</td>
<td>5,137</td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$524,159,395</td>
<td>$524,159,395</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts

xxxix
3.1.2 Alberta

As one of Canada’s strongest tourism performing provinces, Alberta is now poised to establish an Indigenous-specific tourism association to best move forward with the promotion of their diverse cultural offerings. The announcement of this association and funding for its creation were only announced in mid-2018; therefore, the association itself is still in the planning and development stage, and much of what is presented below is based on their strategy.

Organizational Strategy

Indigenous Tourism Alberta (ITA) was incorporated in 2018 as a not-for-profit society to provide leadership in the development and marketing of authentic Indigenous tourism experiences. Specifically, they have targets to grow Alberta’s Indigenous Tourism economy by $35M (+25%) by 2024, and to increase provincial Indigenous tourism market-ready businesses from 66 to 100 (+52%) in that same time period.

The ITA board consists of 8 board members from across Alberta, with the primary responsibility of providing governance and strategic oversight of Indigenous Tourism Alberta, enabling ITA to fulfills its mandate following good corporate governance practices.

It should be noted that Members of the Board are qualified Indigenous tourism leaders, whereas in some provinces with advisory committees there may be members who are not Indigenous, though they still possess valuable skills and experience.

If there is a single fundamental objective for the Association, it is to ‘align the efforts and interests of Alberta’s tourism industry under a common Indigenous tourism strategy’, a challenge in such a heavily populated and diverse province as Alberta.

As discussed further in the section on marketing, there are currently approximately 48 First Nations in Alberta, belonging to at least 9 different Indigenous cultural groups – not to mention the variations in geography, climate, and proximity to large urban centres within these Nations. Creating a ‘common’ or somewhat homogenized strategy will no doubt require much consultation and discussions.

ITA’s membership structure is described below:

<table>
<thead>
<tr>
<th>Organization</th>
<th># of Membership Tiers</th>
<th>Membership Categories (Non-Indigenous)</th>
<th>Requirements for Voting Status</th>
<th>Membership Fees</th>
<th>Membership Product Offerings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indigenous Tourism Alberta</td>
<td>3</td>
<td>1. ITA Non-Voting Non-Visitor Ready 2. ITA Voting Visitor Ready 3. ITA/ITAC Voting Market or Export-Ready</td>
<td>- Minimum Visitor-Ready - Minimum 51% Indigenous owned or controlled - Tourism-related business</td>
<td>N/A</td>
<td>No marketing upgrade offered.</td>
</tr>
</tbody>
</table>

Industry Partnerships & Collaborations

Marketing partners for ITA include Travel Alberta, Destination Canada, Indigenous Tourism Association of Canada, Alberta Culture and Tourism, Statistics Canada, Tourism HR Canada, the Conference Board of Canada, and various tourism marketing partners at the provincial and regional levels.

Of these, Statistics Canada stands out as a unique and perhaps less obvious organization for collaboration with a tourism association; Stats Can provides valuable primary research on the changing demographics of the people of Alberta – income, family size, ethnicity, and so on – all characteristics that can be used to fine-tune Indigenous tourism products and marketing.
Product Development

ITA classifies tourism products as either export-ready, market-ready, or developing as they define below:

- ‘Export-ready experiences meet the diverse needs and expectations of international markets. This includes reservations, marketing, pricing, tour operator, and travel trade needs.’ This would be considered the highest level of product development and so-called market readiness.

- ‘Market-ready experiences provide a consistent experience for visitors with year-round marketing and reservation services.’ It is implied that these products are available and accessible but may better serve local and domestic tourists, as they often may not need to plan their activities so far in advance, nor arrange a detailed international travel itinerary.

- ‘Developing experiences are those building an authentic and compelling product or experience, but not yet ready to go to market.’ The definition of ‘market ready’ can be somewhat subjective, but it is implied that these products & activities may be ready for delivery upon request, but do not yet have their policies/practices/schedules in place, perhaps don’t yet have their own website or other marketing tools, and in general are not quite ready for ‘walk-up’ tourists.

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

As part of ITA’s 5 Year Plan, they intend to ‘lead the growth and development of Alberta’s Indigenous tourism industry, while developing sustainable market-ready and export-ready Indigenous tourism products.’ Specifically, they want to ensure that Alberta’s Indigenous tourism experiences are competitive with other Indigenous products in the country, and with Canadian tourism destinations as a whole.

Marketing

As noted in the opening section, Indigenous culture in Alberta is diverse – more so than most Canadians would recognize, and almost definitely more so than international travellers understand.

ITA points out that as a generalization, North American Indigenous People (‘Indians’) are marketed and perceived internationally as being a fairly homogenized group – that they are all the same – when in fact as stated, Alberta itself is home to 48 Indigenous communities representing 9 Nations, each with its own distinct past, present, and cultural identity.

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

The perception that all the Indigenous experiences and cultures are the same tends to limit the number of experiences and/or places a tourist will visit. To combat this perception and the restricted exploration that results, ITA will endeavour to highlight the history of each distinct region and Nation in the province yet connect them into one overall Indigenous tourism story to be used as the primary marketing premise.

This will appeal to international, domestic, and local (ie. Alberta) travellers, encouraging them to continue to explore Indigenous tourism experiences throughout the province.
Training & Capacity Building

Indigenous Tourism Alberta intends to develop a cultural awareness program for its staff so that they continue to gain a deeper understanding of Indigenous culture and community. They will also offer cultural awareness training to their Destination Marketing Partners and stakeholders to ensure all tourism development and marketing activities are delivered in a culturally sensitive manner.

Emphasis for their support to businesses will be on ‘high-quality, meaningful, and enriching cultural experiences’, and ongoing training and support programs will be developed and delivered to assist new and established Indigenous Tourism Operators. This will be supplemented with an Indigenous Tourism Readiness Guide and workshops, and an annual Indigenous Tourism Summit for Indigenous tourism operators and tourism marketing partners.

In April of 2019, ITA is planning an Indigenous tourism summit at the River Cree Resort and Casino.

Organizational Budget & Funding

In the case of ITA, Alberta’s provincial government has given a $315,000 grant — jointly funded by the ministries of Culture and Tourism and Labour — to ITAC to create this new association, with Travel Alberta contributing another $50,000.

It would appear that ITA will effectively become a part of ITAC – a provincial ‘branch’ of ITAC, rather than its own fully independent association.\(^\text{a}\)

Targets of approximately $2 million in sustainable operating funding will need to be secured through long-term partnerships, with ongoing contributions from ITAC of $65,000 / year, plus expected membership revenues of $6000 to $7000 / year.

<table>
<thead>
<tr>
<th>Name of Representing Organization</th>
<th>Western Provinces</th>
<th>AB</th>
<th>ITAA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
<td>$291,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to GDP**</td>
<td>$166,240,153</td>
<td></td>
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<tr>
<td>Funding as a Percentage of Provincial GDP*</td>
<td>0.18%</td>
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<tr>
<td>Number of Employees*</td>
<td>1</td>
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<tr>
<td>Provincial Indigenous Tourism Contribution to Employment**</td>
<td>2,395</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$387,713,993</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services  
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts
3.1.3 Saskatchewan

Organizational Strategy

Saskatchewan does not currently have a formal provincial Indigenous tourism organization, but rather functions as a subset of ITAC under a regional coordinator. However, great advances have been accomplished over the past year with respect to Indigenous tourism development in Saskatchewan, most notably the International Indigenous Tourism Conference being hosted in Saskatoon in 2018. This successful event has kick-started activities and has produced an increased awareness and interest in developing the province’s Indigenous tourism resources. In addition, important conversations are beginning to happen around Indigenous tourism in the province and people are beginning to take notice of Saskatchewan’s tourism assets. Significant investments have also been made by the federal government for supporting the growth of the industry. ITAC and its regional coordinator for Saskatchewan are working on a provincial strategy with plans for completion within the first quarter of 2019.

Industry Partnerships & Collaborations

Currently, ITAC is the overarching body in charge of coordinating province-wide Indigenous tourism development in Saskatchewan. However, there are other organizations who are beginning to realize the potential that Indigenous tourism holds, for example the Saskatchewan First Nations Economic Development Network (SFNEDN). In 2018, SFNEDN hosted a ‘Spotlight on Tourism Conference’ which aimed to capitalize on the increased interest in Indigenous tourism.

Pursuing strategic partnerships and collaborations within the province are a key initiative being undertaken by ITAC. A partnership with Tourism Saskatchewan seems promising as a new award was announced for an outstanding Indigenous tourism experience at the annual 2019 Saskatchewan Tourism Awards.

Moving forward, some key strategic partners for growing Indigenous tourism in Saskatchewan will be:

- Saskatchewan First Nations Economic Development Network
- Wanuskewin Heritage Park
- All 74 of Saskatchewan’s Indigenous communities

Product Development

Saskatchewan’s Indigenous tourism products and experiences are just starting to come to light and tourists are beginning to take notice of what the province has to offer. Wanuskewin Heritage Park is undoubtedly the province’s most well-known Indigenous tourism facility and cultural learning centre. Having been in operation for 26 years, Wanuskewin is a best practice for Indigenous cultural heritage preservation and sharing. The Park offers various interpretive programs, galleries, private events and other experiential activities.
Recently ITAC released preliminary research data into the size and scope of the Indigenous tourism industry in Saskatchewan. It is estimated that there are 78 Indigenous-owned tourism operations in the province. The businesses’ level of market-readiness are as follows:

- 32% identified as ‘doors open’ – experiences available if you know who to call
- 40% are ‘visitor ready’ – website or Facebook page, defined hours and prices, reachable for visitors
- 27% are ‘market ready’- well-established, good website, reachable 24/7, all permits and insurance in place, some promotional materials and marketing
- 1% are ‘export ready’ – focused on international markets, partnerships with tour operators, sophisticated pricing structures such as vouchers and commissions, higher-level marketing strategies and materials

Currently, ITAC features 3 market-ready Indigenous tourism experiences in Saskatchewan on its website.

Marketing
Aligning a coordinated effort for Indigenous tourism development in Saskatchewan is still in its early stages. Therefore, the main focus for marketing activities in province is centred upon creating strong partnerships that will help to promote Indigenous operators, businesses, products, services and experiences.

Tourism Saskatchewan’s 2018/19 plan indicates as one of its key actions to work with ITAC on an approach to develop market-ready Indigenous tourism products. This is the initial step towards marketing what the region has to offer.

Training & Capacity Building
Training for developing Indigenous tourism in Saskatchewan is also still in its infancy. Nonetheless, the crucial first steps have already taken place which have included the Saskatchewan Regional Forums, which were held in May and June of 2018 and the Saskatchewan Indigenous Tourism Planning Day, or Saskatchewan Day, which was held in October.

Saskatchewan Day saw over 145 Indigenous tourism entrepreneurs, community leaders and tourism partners from across the province gather to discuss the future of the Indigenous tourism industry in Saskatchewan.

These 2 events were held in order to hear from Indigenous business owners, communities and partners on priorities and potential challenges for growing the industry. These events were also a step towards educating Indigenous tourism stakeholders about ITAC’s initiatives in the province.

Organizational Budget & Funding
2018 was a good year for Indigenous tourism in Saskatchewan in terms of acquiring funding from the federal government. In March, Western Economic Diversification Canada announced a contribution of $220,000 to support the development of Indigenous tourism associations in Alberta, Saskatchewan and Manitoba.

In addition, the Wanuskewin Heritage Park Authority received funding of $550,026 to support the Park’s expansion of new exhibit galleries.

In October of 2018, Western Economic Diversification Canada announced another large funding contribution to support Indigenous tourism development in Saskatchewan. $600,000 was provided to Whitecap Dakota First Nation in partnership with Wanuskewin and Beardy’s and Okemasis First Nation to develop an Indigenous tourism corridor along the South Saskatchewan River.

<table>
<thead>
<tr>
<th>Western Provinces</th>
<th>SK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Representing Organization</td>
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</tr>
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<td>Annual Government Core Funding for Organizational Operations*</td>
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<td>Funding as a Percentage of Provincial GDP*</td>
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<td>Number of Employees*</td>
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<tr>
<td>Provincial Indigenous Tourism Contribution to Employment**</td>
<td>2,984</td>
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<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$252,886,369</td>
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</tbody>
</table>

*Source: Canadian Ecotourism Services
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts
### 3.1.4 Manitoba

In recent years Manitoba had both the Manitoba Aboriginal Tourism Association (MATA) and the Eastside Aboriginal Sustainable Tourism Association, but neither exists at this time.

**Organizational Strategy**

Manitoba does not currently have a formal provincial Indigenous tourism organization, but rather functions as a subset of ITAC under a regional coordinator.

Manitoba’s current top 3 priorities for supporting Indigenous tourism are:
1. Training
2. Capacity building
3. Access to capital

**Industry Partnerships & Collaborations**

In the fall of 2017 Travel Manitoba and ITAC agreed to a 3-year memorandum of understanding to help grow the province’s Indigenous tourism industry—an industry that contributes roughly $74 million a year to the province’s GDP.

The Manitoba MOU is based on the objectives of ITAC’s national five-year strategic plan which include:
- Building leadership capacity
- Supporting the development of existing and new Aboriginal tourism experiences
- Building an Indigenous marketing platform, and
- Advancing partnerships to help grow the Indigenous tourism industry

Subsequent to the signing of the MOU, ITAC and Travel Manitoba co-hosted the first meeting of the Manitoba Indigenous Tourism Advisory Committee in early 2018, established to provide strategic guidance and recommendations on how to advance Indigenous Tourism in Manitoba.

At the time of this inaugural meeting there were seven members of the committee: Committee Chair David Daley, Wapusk Adventures (Metis – Churchill); Sophia Rabliauskis, Sagatay Lodge (Poplar River First Nation); Desmond Mentuck, Parks Interpreter (Waywayseecappo First Nation); Marilyn Tanner-Spence, Teekca’s Boutique (Winnipeg); Carl Smith, Brokenhead Sky Wind Tours & Debwendon (Brokenhead Ojibway Nation); Jason Gobiel, Community Coordinator (Brandon); Josh Sinclair, Bay River Developments (Fisher River Cree Nation).

In 2017 ITAC facilitated 4 Indigenous tourism industry engagement sessions throughout Manitoba. Marketing Support, Product Development, Access to Finance, Technical Support, and Tourism Service Training Skills were the areas identified by participants as most needed to grow Manitoba’s Indigenous tourism industry. Considering there are so few ‘market ready’ Indigenous tourism products in Manitoba, the fact that marketing support was the number one request may highlight a disconnect or misperception by industry.

**Product Development**

Ryan Duplassie was hired as the Regional Coordinator for the newly formed Indigenous Tourism Manitoba committee.

Part of his mandate is to get 5 existing tour operators up to market-ready level, and 5 market-ready up to export-ready. He’ll also be helping people get from the idea stage to market-readiness.

But he noted in our telephone interview that while there is a large number of tour operators in the province, very few are Indigenous; in fact, only 7 businesses are being marketing by ITAC at the moment within Manitoba, and of those only 2 offer a cultural experience. Subsequently it is difficult for an Indigenous tourism organization to attract tourists to Manitoba if there are no products to sell.

**Marketing**

As noted above, there are only 7 Indigenous businesses in Manitoba currently promoted by ITAC. Travel Manitoba shows no actual Indigenous businesses under ‘Manitoba Indigenous Experiences’; similarly, a search for ‘Aboriginal’ on the Travel Manitoba website presented a few festivals, events, and art galleries/craft shops.

*Photo Credit: Travel Manitoba*
Training & Capacity Building

Guidelines have been developed through ITAC for market-readiness/export-readiness to determine a business’ current operating level. Once suitable Indigenous businesses have been identified, they will be contacted to maintain ongoing conversation to ensure they have access to training and support and are aware of funding that may be available to them.

Findings from ITAC’s industry engagement sessions note the following areas are seen as priorities for product development in the eyes of industry:

- Outdoor Adventure
- Workshops & Cultural Training
- Live Events & Festivals
- Lodging/Accommodations
- Wildlife Viewing

Organizational Budget & Funding

ITAC has committed $350,000 over 3 years to new Manitoba Indigenous Tourism Strategy and business plan for a future Manitoba Aboriginal Tourism Association.

<table>
<thead>
<tr>
<th>Western Provinces</th>
<th>Name of Representing Organization</th>
<th>MB</th>
<th>ITAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
<td>$65,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to GDP**</td>
<td>$41,729,315</td>
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<tr>
<td>Funding as a Percentage of Provincial GDP*</td>
<td>0.16%</td>
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<tr>
<td>Number of Employees*</td>
<td>1</td>
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<tr>
<td>Provincial Indigenous Tourism Contribution to Employment**</td>
<td>1,002</td>
<td></td>
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<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$94,133,678</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts
3.1.5 Quebec

For the purposes of this jurisdictional scan, the research team examined 2 provincial Indigenous tourism organizations in Quebec: Quebec Aboriginal Tourism (QAT) and the Cree Outfitting and Tourism Association (COTA).

Quebec Aboriginal Tourism

Organizational Strategy

Quebec Aboriginal Tourism (QAT) is the sectoral tourism organization recognized by Tourisme Québec as the official representative of Quebec’s aboriginal tourism industry. The association represents 11 Nations and 55 communities throughout the province.

QAT’s primary objectives are to support the development and promotion of the Aboriginal tourism industry in Quebec, while supporting the development of best business practices.

QAT is operated by five staff – Executive Director, Operations Manager, Development Advisor, Marketing Advisor, Communications and Marketing Agent.

The Board is composed of 9 seats: 5 for Active members, 2 for Delegates members and 2 seats for Associate members.

QAT’s membership structure is described below:

<table>
<thead>
<tr>
<th>Organization</th>
<th># of Membership Tiers</th>
<th>Membership Categories (Non-Indigenous)</th>
<th>Requirements for Voting Status</th>
<th>Membership Fees</th>
<th>Membership Product Offerings</th>
</tr>
</thead>
</table>
| Quebec Aboriginal Tourism | 4 | 1. Regular active member - Voting  
> Active outfitter  
> Active event  
> Active artist and artisan  
2. Auxiliary Member - Non-Voting  
3. Associate member - Voting  
4. Delegate member - Voting | All members can vote (including non-Indigenous organizations) except for Auxiliary Members - Auxiliary members are Aboriginal people or corporations, in the process of obtaining accreditation for their business activity and/or in their first two years of operation. | $500 | All Active members get website listing and 1/3 page in the annual Origins(4), Quebec’s Aboriginal Tourism Magazine. Active Members also given option to upgrade to:  
- larger listing in magazine ($1,000 to $5,000)  
- web banner ad ($65/month)  
- Newsletter promo ($55)  
- Newsletter Advertorial ($100 text-only) |

Canadian Ecotourism Services (CES)© 2019 Report
Industry Partnerships & Collaborations
Quebec Aboriginal Tourism represents its members on various national and provincial committees and partnerships.

- Indigenous and Northern Affairs Canada
- Aboriginal Tourism Association of Canada
- Agences Réceptives et Forfaitistes du Québec (ARF-Québec)
- Assembly of the First Nations of Quebec and Labrador
- Aventure Écotourisme Québec
- Conseil québécois des ressources humaines en tourisme
- First Nations of Quebec and Labrador Economic Development Commission
- Institut de tourisme et d’hôtellerie du Québec – Coaching Program
- Mouvement québécois de la qualité – Performance network
- Quebec Tourism Industry Alliance
- Quebec Outfitters Federation
- Joint Round Table Culture and Event Related Strategies – Tourisme Québec
- Nature Round Table + Joint Round Table on Nature Related Strategies – Tourisme Québec
- Alliance de l’industrie touristique du Québec

Each active member of Québec Aboriginal Tourism now automatically becomes a member of the Indigenous Tourism Association of Canada (ITAC).

In 2015 QAT had 159 members; 126 enterprises, band councils, and aboriginal associations; and 33 associate members.

Product Development
In addition to ongoing support for entrepreneurs, QAT assisted Parks Canada and INAC in developing Indigenous product offerings for the cruise ship industry for 5 different communities/regions.

Marketing
QAT markets its members through television shows – English and French – primarily via outdoor adventure and hunting and angling type shows. They also maximize their print media exposure through articles in a variety of publications including Best of Quebec, and Air Inuit Magazine.

In 2015 with their partners (AEQ, QOF, SEPAQ, and TQ) QAT invested $130,000 in web and print advertising aimed at markets in Europe, the United States, and Canada. And of course, they place a strong emphasis on the value of social media, including Facebook, Twitter, and Flickr.

QAT has represented its members at trade shows in Quebec, Toronto, Winnipeg, Vancouver, and at key shows in Europe. They have also partnered with more than a dozen travel agencies to offer FAM tours, and have actively participated in press tours throughout Quebec and Europe.
They have also recently launched Origin(e) – a substantial magazine publication highlighting Aboriginal experiences throughout all of Quebec.

Training & Capacity Building
QAT provides workforce professionalism guidance for nature and adventure tourism, and for aboriginal outfitting businesses. They also offer up to $10,000 per applicant to assist with product development, marketing, etc.

A Regional Development Tour of the Abitibi-Temiscamingue region was completed in 2015, and Academos was established to provide online mentoring for youth between the ages of 14 and 30.

QAT has offered a Nature and Adventure Training Course in partnership with AEQ, the QOF, and the CQHRT.

Organizational Budget & Funding
In early 2017 funding of $70 million was announced as part of the 2017-2020 Tourism Investment Plan for tourism development around five key business sectors in Quebec. At present QAT receives approximately $1.3M in annual government funding.

ITAC has signed a 4-year memorandum of understanding with QAT to formalize the working relationship between the two organizations. The agreement includes contributions of $200,000 from ITAC and $800,000 from QAT so that the two organizations can work collaboratively to leverage resources, divide marketing tactics, direct funding requests, and establish a structure for ongoing translation services on all official documentation as per the objectives of ITAC’s Five Year Plan.
Cree Outfitting and Tourism Association (COTA)

Organizational Strategy

COTA was officially incorporated in 2000, and until 2007 was the regional tourism association (RTA) for the area. But in 2007 COTA formed EIT – Eeyou Istchee Tourism - to best meet the criteria of an RTA as defined by the Quebec government. Essentially, COTA now places more of its focus on supporting its members by way of training, funding, and product development; whereas EIT is more focused on marketing and promotion.

An Eeyou Istchee Baie James website – escapellikeneverbefore.com – is the main site for tourists interested in pursuing activities in the region – though the site also promotes non-Cree communities and activities.

Most recently Voyages Eeyou Istchee Baie-James (Voyages EIBJ) has been created by COTA as the region’s Destination Management Company (DMC) in partnership with EIT and TBJ (Tourism Baie-James). The company specializes both in vacation and business travel and facilitates travel for visitors by providing online booking and invoicing tools.

The COTA Board is comprised of twelve members who serve a 3-year term. One board member is appointed by the Cree Nation Government, nine are elected by the COTA membership and two are appointed by the Elders council. COTA policy stipulates that there must be at least one member from each of the nine Cree communities of Eeyou Istchee. Each member must be a Cree Beneficiary and closely affiliated with his or her community.

There are currently 13 staff positions listed on their website:
- Executive Director
- Treasurer
- Bookkeeper/Corporate Secretary
- Assistant to the Executive Director
- Digital Animator
- Coordinator, Marketing and Promotion for EIT & TBJ
- Marketing Assistant
- Tourism Information Network Coordinator
- Communications and Members Services Officer
- Product Development Officer
- Human Resources Coordinator
- Special Projects Officer
- Administrative Assistant

Taken from COTA’s website:

‘Our mission is to develop and implement a collective vision for a world-class sustainable tourism industry in Eeyou Istchee that is in harmony with Cree culture and values and that involves a partnership with Cree communities, institutions, and businesses.

- Provide marketing, booking, and promotion services, where necessary, for Cree outfitting and tourist operations.
- Provide business, management, accounting and professional services, where necessary, for Cree outfitters and tourist businesses.
- Place a priority on increasing awareness of tourism as a sustainable economic development opportunity.
- Increase the capacity of local and regional institutions to provide services by improving access to information.
- Support and undertake training and skill development initiatives that recognize Cree skills and industry standards.
- Develop alliances and coordinate with other tourism and Indigenous organizations to work toward common goals.
- Promote partnerships among Cree businesses, communities, and institutions.
- Represent the interests of COTA members at meetings with governments, commissions, other organizations, and non-native developers.
- Support the development of Cree tourist products that exceed market standards by creating quality standards and by recognizing success with awards.’

Product Development

Recently there has been much interest and support for expanding marine tourism in the region. Given Eeyou Istchee’s access to James Bay and Hudson Bay, this is an excellent opportunity to explore. Funding was secured from Aboriginal Affairs and Northern Development Canada (AANDC) and Cree Nation Government (CNG) to initiate a Coastal Cruises and Marine Captain Training project in 2017; and by early 2018 with 9 newly certified Marine Captains, the Winipaakw Tours Solidarity Co-op was formed as the organization that will oversee sustainable coastal tourism for Eeyou Istchee.

In partnership with the Cree Nation of Mistissini, the Oujé Bougoumou Cree Nation, and Huttopia (a ‘ready to camp’ model originating in France), COTA is creating Creetopia - a ready-to-camp tent designed exclusively for use in Eeyou Istchee. Inspired by traditional Cree architecture, they are canvas tents erected on wooden platforms, many with toilets, showers, and wood burning stoves, and with the basic amenities required for a comfortable stay.
Marketing
COTA’s 2017-18 Annual Report shows their participation in the Second International Économusée Network (ENS) Conference, which was held in Bergen, Norway. These events showcase traditional artisans and their crafts, promoting them to the public.

As EIT is the primary marketing force for Cree businesses in Eeyou Istchee, they were engaged in a variety of marketing initiatives. Eeyou Istchee Tourism secured funding for three years from Canada Economic Development to recruit a Marketing Agent. This individual is responsible for participating in trade shows, creating and distributing promotional materials, organizing FAM and media tours, and engaging with press and interviews. Notable trade shows included the Northern Lights and the Travel and Vacation shows in Ottawa, the Travel and Adventure show in Washington DC, and Rendez-Vous Canada.

EIT and TBJ (Tourisme Baie-James) created the ‘Into the North’ promotional campaign to promote Eeyou Istchee Baie-James as an international destination focusing primarily on attracting visitors from Quebec, Ontario, Western Canada, and Europe.

An innovative element to ‘Into the North’ was the implementation of an online contest inviting participants from around the world to submit a short video introducing themselves and describing why they should be selected to win an all expenses paid trip to Eeyou Istchee, complete with accommodations, travel, and activities. The winners will have their adventure filmed and turned into a web series that will be broadcast online.

In fact, ‘Into the North’ received a Digital Marketing Award at the 2nd edition of the Prix Excellence Tourisme, on November 6th in Quebec City. This prize was presented to both Regional Tourism Associations – EIT and TBJ - a first for the two RTAs as well as for the region.

A Cooperative Marketing Program was introduced to provide financial incentives to EIT and TBJ members to form alliances and collaboratively promote their tourism products and packages. This includes print media such as adventure and hunting & fishing magazines, as well as participation at travel and tourism trade shows and festivals.

Training & Capacity Building
COTA typically offers a variety of training and capacity building programs and workshops on a regular basis. Recently they coordinated a 5-day Cree Entrepreneur Bootcamp and have been offering one-on-one assistance with entrepreneurs through their Product Development Coaching Program. Over the 2017-18 fiscal year, two Cree-owned businesses were provided with 12 months of ongoing coaching and support.

COTA & EIT provide free online training for individuals who register as an Eeyou Istchee Baie-James Ambassador via ‘Online Training Capsules’ designed to increase front-line employees’ tourism-related skills. The capsules include topics such as An Introduction to Eeyou Istchee Baie-James, Regional Realities, Features and Events, and Customer Service. Each training capsule is about 10 minutes long and includes a short quiz.

COTA has also coordinated an 8-hour First Host hospitality workshop in various communities, along with Advanced Wilderness First Aid Training, French language teaching, Food Safety & Hygiene, and the development of Cree Entrepreneur Kits.

Organizational Budget & Funding
For the year 2017-18, COTA’s received revenue for operations was $1,550,763 which included $24,832 from book sales and other revenue. The remaining revenue was received from various levels and departments of government. The largest portion of COTA’s expenses went to ‘project expenses’. For the year 2017-18, Eeyou Istchee Tourism received $1,036,513 in revenue. This again was largely made up of contributions from various levels of government, along with almost $200,000 in revenue from the territory.

<table>
<thead>
<tr>
<th>Eastern Provinces</th>
<th>Name of Representing Organization</th>
<th>QC</th>
<th>QC COTA/EIT</th>
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<td>$1,300,000</td>
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<td>Funding as a Percentage of Provincial GDP</td>
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<td></td>
<td>Number of Employees</td>
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<td></td>
<td>Provincial Indigenous Tourism Contribution to Employment</td>
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<tr>
<td></td>
<td>Provincial Indigenous Tourism Output**</td>
<td>$297,621,179</td>
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</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts
3.1.6 New Brunswick

There is no specific Indigenous tourism association in the province at this time; however, two particular projects are endeavouring to set the bar for Indigenous tourism in New Brunswick.

Metepenagiag Heritage Park

Metepenagiag Heritage Park marks the site of a 3,000-year-old Indigenous community, with archaeological displays, historic Mi'kmaq ceramic pottery, and interpretation on the significance of the Augustine Mound and the Oxbow National Historic Sites. The Park includes interactive displays, tours, interpretive trails and a Mi'kmaq boutique.

They are also taking advantage of the global growth of culinary tourism. Reservations must be made to participate and enjoy a ‘Taste of Metepenagiag – Ookdotaan’, where visitors play an active role in gathering fresh ingredients for the tea and food that will be traditionally prepared in an outdoor cooking shelter. Stories of Metepenagiag are shared with guests before and after a sampling of traditional, seasonal food is offered.

Photo Credit: Province of New Brunswick

Metepenagiag Heritage Park partners with Discover Miramichi, ITAC, the University of New Brunswick, Tourism Industry Association of New Brunswick, Atlantic Canada Opportunities Agency, and the Association of Museums New Brunswick.

The Park is within walking distance of Metepenagiag/Red Bank Lodge, which offers local traditional foods in a rustic yet fully serviced log cabin style building, with accommodations and conference facilities.

Pow Wow Trail (Indigenous Tourism Trail)

Tourism New Brunswick is actively promoting the province’s Pow Wow Trail that includes:

- St. Mary’s (Sitansisk) First Nation powwow
- Tobique (Negootkook) First Nation powwow
- Pabineau First Nation (Oinpegitjoig l’noeigati) annual powwow
- Eel Ground First Nation — Natoaganeg powwow
- Metepenagiag Mi’kmaq Nation powwow
- Oromocto (Welamoktuk) First Nation powwow
- Burnt Church (Esgenoôpetitj) First Nation powwow
- Eel River Bar (Ugpi’ganjig) First Nation powwow
- Elsipogtog First Nation powwow

Industry Partnerships & Collaborations

In the fall of 2017, the Tourism Industry Association of New Brunswick (TIANB) signed a Memorandum of Understanding with ITAC to establish a partnership between the two organisations to promote the development of Indigenous tourism in New Brunswick.

Together, their goal will be to develop programs and services aimed at increasing Indigenous involvement in tourism jobs and businesses, work together on marketing and promotions initiatives, promote best practices through resources and training, and cross-support each other’s memberships.

Product Development

Marie Kryszko, from Pabineau First Nation, is an example of how an individual can launch a small-scale cultural business with low start-up costs and investment. Mother Earth’s Journey provides a hands-on tour with authentic cultural experiences for her guests.

During the tours, participants are led to a sacred place along the river where Marie shares her intimate knowledge of Mi’kmaq culture. Guests participate in an earth walk and releasing ceremony, a smudging ceremony with traditional teachings, make their own medicine pouches, and even have an opportunity to play the rattle, sing, and dance.

The tour concludes with Indian bread and tea, and throughout the tour Marie encourages her guests to try to learn some words in Mi’kmaq.

This kind of authentic Indigenous experience is so easily transferable to virtually any Indigenous community throughout the country.
Marketing
Currently, Indigenous tourism businesses in the province are promoted and marketed through ITAC, TIANB, Tourism New Brunswick, and through their own websites and marketing media.

Training & Capacity Building
In 2018, ITAC hosted a Best Practice Mission to Wendake, Quebec with the Province of New Brunswick, the Atlantic Canada Opportunities Agency and Indigenous representatives.

Though not specifically tourism related, the Joint Economic Development Initiative (JEDI) offers valuable funding, training, and support services for Indigenous businesses and entrepreneurs.

They currently offer an Aboriginal Development Fund that provides financial support for things such as:

- Business and marketing plans
- Management training
- Entrepreneurship development
- a 10-week Indigenous Business Incubator program
- a 10-week Indigenous Business Accelerator program.

Organizational Budget & Funding
When the plan to construct Metepenagiag Heritage Park was originally approved, the Province of New Brunswick contributed $1 million to the project and the Metepenagiag Mi’kmaq Nation contributed $500,000.

The Government of Canada invested a total of $7.1 million as follows: $2 million from the Department of Indian Affairs and Northern Development; $2 million from the Atlantic Canada Opportunities Agency; $1.6 million from the Department of Canadian Heritage; and $1.6 million from the Parks Canada Agency.

$6.6 million of these contributions went towards the construction of the Metepenagiag Heritage Park, with the remaining $2 million funding commitment going towards operational funding for 10 years.

<table>
<thead>
<tr>
<th>Name of Representing Organization</th>
<th>Atlantic Provinces</th>
<th>NB Met Park/ITAC</th>
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<tbody>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
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<tr>
<td>Provincial Indigenous Tourism Contribution to GDP</td>
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<tr>
<td>Funding as a Percentage of Provincial GDP</td>
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<td>Number of Employees</td>
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<tr>
<td>Provincial Indigenous Tourism Contribution to Employment</td>
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</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$71,333,669</td>
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</tbody>
</table>

*Source: Canadian Ecotourism Services
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts

Canadian Ecotourism Services (CES) © 2019 Report
3.1.7 Nova Scotia

Organizational Strategy

The Nova Scotia Indigenous Tourism Enterprise Network (NSITEN) is the organization that represents Indigenous tourism for the province. It is a volunteer based, not for profit cultural tourism organization that supports authentic cultural tourism businesses and community enterprises in Nova Scotia.

Only coming into existence in late 2017, the current structure of the Board of Directors is on an interim basis and is being guided by the volunteers that were the founding directors of the organization.

NSITEN has an operational strategy in place that is based on ITAC’s 4 pillars: development, marketing, leadership and partnerships. Of their 3-year strategy, they are just scratching the surface, having completed about 20-25% of the action items. This is due to a lack of operational funding.

NSITEN’s current top 3 priorities for supporting Indigenous tourism include:

1. Growing capacity of Indigenous communities and businesses as it relates to the tourism sector
2. Growing the Indigenous tourism sector, through cultural revitalization and authenticity
3. Developing a model that encompasses different sectors including Indigenous leadership, partners, government and the corporate sector

There is an emphasis on authenticity and quality throughout their goals and mandate, as well as a commitment to working collaboratively with ITAC and their 5 Year National Plan — ‘The Path Forward’.

NSITEN promises to work ‘together with individual community members, business owners, community band enterprises, cultural knowledge keepers, artists & crafters’ to create new opportunities and maximize benefits received.’ They plan to offer industry/business training opportunities, knowledge of tourism strategies, and board and community development to support new and existing Indigenous entrepreneurs. And lastly, NSITEN will actively pursue opportunities for its members to access capacity development funding, business loans and industry representation.

NSITEN’s membership structure is described below:

<table>
<thead>
<tr>
<th>Organization</th>
<th># of Membership Levels</th>
<th>Membership Categories (Non-Indigenous)</th>
<th>Requirements for Voting Status</th>
<th>Membership Fees</th>
<th>Membership Product Offerings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nova Scotia Indigenous Tourism Enterprise Network</td>
<td>6</td>
<td>1. Indigenous-owned business (Entrepreneur) - Voting Member 2. Indigenous-owned business (Band Enterprise) - Voting Member 3. Artist / Creator - Non-Voting 4. Educator / Knowledge Keeper / Youth / Student - Non-Voting 5. Associate Member (Business/Organization) - Non-Voting 6. Tourism Champion (Industry/Government/NGO/Funder) - Non-Voting</td>
<td>1. Must have a valid Indian Status Card as recognized by the national Indigenous organizations of Canada 2. Must have identification matching your information on your status card 3. Only nationally recognized status cards and individual cards holders from the national Indigenous organizations will be accepted</td>
<td>$200 (Business or Organization) $250 (Industry/Government/NGO/Funder) Not yet listed on website</td>
<td></td>
</tr>
</tbody>
</table>

Product Development

One of the recent successes for Indigenous tourism in Nova Scotia is a unique and hands-on tour offered by Eskasoni Cultural Journeys. The tour was developed six years ago by Tracy Menge, the Economic Development Manager for Eskasoni First Nation, and Maureen Caroll, a Tourism Development Consultant.

A heritage interpreter from the community leads the tour, dressed in full hand-made regalia. Over the course of a little more than 2 kilometres of trail on Goat Island on Bras d’Or Lake, they stop at several mock traditional villages to learn about Mi’kmaq culture. The tour has proved to be incredibly popular, welcoming over 700 people each week in October 2017, and 62 cruise ship tours in the same season. This has forced the tour to hire additional staff from the community to keep up with the increased demand, in addition to all the community members already working there.

A surprise benefit of the trail is how it has encouraged active living among community members. Many people from the community now use the trail for recreation and exercise, and it has even seen new local businesses created such as the new Goat Island Café. As it stands, there are currently 5-10 marketing ready Indigenous tourism products that can be promoted in Nova Scotia.
Marketing
Since NSITEN is still a relatively new organization, their first orders of business are to firm-up their organizational structure and Board of Directors, host regional workshops, and assemble a database of Indigenous tourism operators, artists, and craftspeople in the province.

Once that is complete, they will continue to work with ITAC to best market and promote their tourism offerings.

As it stands, NSITEN dedicates approximately $5,000 (8% of their organizational budget) to their marketing budget each year. Approximately 75% of NSITEN’s marketing efforts are dedicated towards building their membership and the remaining 25% towards promoting market-ready products and services.

Training & Capacity Building
In the spring of 2018, NSITEN took part in a training program hosted by the Tourism Industry Association of Nova Scotia (TIANS). This program included 2 regional sessions in 2 communities and was geared towards providing an introduction to the tourism sector.

For 2019, NSITEN will focus on human resource and Board development. They will also support training for Indigenous workers in tourism.

As far as projects are concerned, NSITEN has prioritized several specific initiatives they will commence with. The first will be an updated database of existing businesses involved in cultural tourism in the Nova Scotia Region. The goal is to discover who is currently in the cultural tourism industry, those interested in starting a business, and to begin populating their Artists & Crafters Co-op database.

The Mi’kmaw Cultural Authenticity Arts and Crafts Coop will provide free support services to ‘authentic’ Mi’kmaw cultural music performers, craft makers, artisans, dancers, and Traditional Knowledge Keepers. The first task for this project will be creating a database of qualified artists, crafters and knowledge keepers that meet the organizational membership criteria. Once this is complete NSITEN will begin to organize events to bring these individuals together to discuss strategies and share ideas on how to maximize their potential – both in the cultural tourism stream, but also in mainstream tourism in the province.

Next, they will be organizing 3 Regional Cultural Tourism Sessions focusing on educating more people about NSITEN, and opportunities to become involved in cultural and ‘mainstream’ tourism in the province.

In November of 2018, NSITEN hosted the Nova Scotia Indigenous Tourism Conference which was successful with a total of 85 attendees. This will likely become an annual event for the organization.

Organizational Budget & Funding
Currently NSITEN receives $65,000 annually from ITAC to operate, however this of course is not sufficient to fully represent the entire province’s Indigenous tourism industry. Access to funding programs is also a challenge as the current system makes it difficult for entrepreneurs and businesses to access capital.

<table>
<thead>
<tr>
<th>Name of Representing Organization</th>
<th>NSITEN</th>
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<tbody>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
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<tr>
<td>Provincial Indigenous Tourism Contribution to GDP</td>
<td>$31,581,733</td>
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<td>Funding as a Percentage of Provincial GDP</td>
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<td>795</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$51,403,986</td>
</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts

Photo Credit: Eskasoni Cultural Journeys
3.1.8 Prince Edward Island

Organizational Strategy
Apart from the territories, PEI has the smallest population of any of the Canadian provinces; it is also the smallest in size. No specific Indigenous tourism association exists at this time in PEI, though ITAC recently released a five-year strategic plan which aims to increase Indigenous tourism across the country.

Industry Partnerships & Collaborations
Charlie Sark is the interim ITAC board member for PEI and has stated that he believes the Mi’kmaq people of PEI should look at growing Indigenous tourism on the Island with the help of ITAC.

Moving forward with Indigenous tourism on PEI, it will be beneficial to explore partnerships with the following organizations:
- Tourism PEI
- Regional Tourism Associations and Destination Management Organizations
- Tourism Industry Association of PEI (TIAPEI)
- Native Council of PEI
- Mi’kmaq Confederacy of PEI

It is also worth noting that the Mi’kmaq Confederacy of PEI has established a partnership with Parks Canada with the goal of actively engaging PEI First Nations in the management of PEI National Park and National Historic Sites. This includes the presentation of Mi’kmaq history and culture at Parks Canada sites and beyond.

Product Development
Charlie Sark believes PEI could conceivably be home to several new businesses and knows of Mi’kmaq individuals interested in pursuing cultural tourism. He reinforces the opportunities that exist in PEI for Indigenous culinary tourism and experiential tourism.

According to ITAC, Atlantic Canada has the smallest number of the country’s Indigenous tourism businesses, and at this time PEI has only one Indigenous tourism business listed on the association’s membership directory - The Indian Arts and Crafts shop at Lennox Island.

The Community of Lennox Island First Nation is championing Indigenous tourism on PEI, particularly the Lennox Island Mi’kmaq Cultural Centre which officially opened in 2000.

The centre has interpretive displays that explain the history, culture, language, spirituality and religion of the Mi’kmaq people, and has definitely placed an emphasis on hands-on, experiential tourism activities such as: birch bark and porcupine craft making, making beaded flowers, rattle making, and cultural cuisine. They also offer dancing, drumming, and storytelling on a fee per performance basis.

2018 was the first year that Lennox Island began offering 3 options for authentic Mi’kmaq experiences:
- Bannock and Clams in the Sand
- Beat of One Drum
- Porcupine Quill Art on Birch Bark

Since Lennox Island began offering these cultural experiences, visitor numbers have increased 50% in the community compared to the year prior. Looking to the future, Lennox Island hopes to build a traditional wigwam village for visitors to stay overnight.

The community of Scotchfort – part of Abegweit First Nation – has recently begun to express interest in cultural tourism; in fact, the development of a cultural lodge, traditional cooking classes, and an overall cultural tourism plan are included in their 2018 Comprehensive Community Plan.
There has been strong support for a new infrastructure project that will provide the Mi’kmaq First Nation communities with a modern, central hub for developing and supporting cultural programming and Indigenous entrepreneurship. The Government of Canada and Government of PEI are providing funding to Mi’kmaq Holdings Inc. to create an Urban Indigenous Centre on the Charlottetown waterfront. The 18,000-square-foot, three-storey building will provide a venue for business skills development and employment services, Indigenous program and service delivery, cultural tourism, and several social enterprises, as well as leasable tenant space. The new space is slated to have:

- Artisan craft space
- Cultural demonstrations
- Multi-functional performance area
- Commercial kitchen
- Video production and training space
- A rooftop patio/urban garden
- Urban delivery point for Indigenous social programming and services offered by the Mi’kmaq Confederacy

**Marketing**

As mentioned, ITAC’s website does not currently list the Lennox Island Mi’kmaq Cultural Centre; however, the Centre does have its own website — experiencelennoxisland.com — and it is cross-promoted on the main site for Lennox Island First Nation. They also advertise in Welcoming PEI Magazine.

In June of 2018, a group of German travel writers visited Lennox Island to participate in the hand drum workshop as part of a promotional tour hosted by the Nova Scotia and PEI tourism departments. IV

**Training & Capacity Building**

There are minimal initiatives currently in PEI related to training and capacity building for Indigenous tourism. In Lennox Island First Nation, experienced artisans offer some of the cultural experiences to tourists. These skills have of course been passed down from previous generations. With the growing interest of Indigenous tourism in PEI, groups such as Lennox Island First Nation will most likely support the creation of training and capacity building programs. Lennox Island wants to build careers in tourism for people in the community.

**Organizational Budget & Funding**

In June of 2017 it was announced that ITAC will be developing an Atlantic Chapter of its organization. The Government of Canada contributed $70,000 towards this initiative, and ITAC is contributing an additional $30,000. This will have a positive and unifying effect for Indigenous tourism in PEI, NB, NS, and Newfoundland & Labrador.

In 2018, Lennox Island First Nation received a total of $55,500 to support its organizational operations relating to tourism. $28,000 was received from Indigenous and Northern Affairs Canada (INAC) and a total of $27,500 from the Government of PEI.

<table>
<thead>
<tr>
<th>Atlantic Provinces</th>
<th>Name of Representing Organization</th>
<th>PEI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lennox Island FN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
<td>$55,500</td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to GDP</td>
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<tr>
<td>Funding as a Percentage of Provincial GDP</td>
<td>1.32%</td>
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<td>Number of Employees</td>
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<tr>
<td>Provincial Indigenous Tourism Contribution to Employment</td>
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<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$7,187,176</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services

**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts
3.1.9 Newfoundland & Labrador

Organizational Strategy

Newfoundland and Labrador has achieved significant advances within its local Indigenous tourism industry. ITAC currently has a regional representative for Atlantic Canada and Board Member for Newfoundland and Labrador, which will further support the growth of the industry on the east coast. In the past, ITAC has completed community consultations and it was identified that the provinces would prefer to have different chapters for each province versus a chapter for Atlantic Canada.

ITAC’s provincial efforts for Newfoundland and Labrador include the creation of a provincial Indigenous tourism strategy that will guide development into the future; this is anticipated to be completed by April of 2019. There also exists a volunteer provincial working group/steering committee comprised of individuals from all of the 5 nations within the province who oversee the development of Indigenous tourism on a provincial level.

Newfoundland and Labrador is an interesting case study as there are a few strong Indigenous groups supporting the development of the tourism industry. Firstly, there is the Nunatsiavut, the autonomous Inuit territory located within Labrador, established in 2005. The government’s tourism department, Tourism Nunatsiavut has developed a strategic tourism plan for the years of 2014 – 2020 with a focus on marketing, product development and human resources/training. Their mission is as follows:

Tourism Nunatsiavut will stimulate the growth of culturally and environmentally sustainable, responsible, as well as economically-viable travel products, honouring the traditions, legacies and future of the Inuit.

The development of the tourism industry in Nunatsiavut revolves around offering a unique Inuit experience, highlighting:
- The 5 communities of Rigolet, Postville, Makkovik, Hopedale, and Nain
- The Torngat Mountains National Park Base Camp and Research Station
- Sites of historic or cultural interest, previously inhabited homestead areas and wilderness locations
- The Mealy Mountains National Park Reserve

There are also 2 notable Indigenous communities who are doing their part for growing the industry. Qalipu First Nation is leading the way for Indigenous tourism development in Newfoundland and Labrador. Qalipu is made up of 66 traditional Mi’kmaq communities and is one of the largest First Nation groups in Canada. Their tourism department, Experience Qalipu promotes Indigenous experiences, products and services and has a growing base of members. Experience Qalipu’s mission statement is as follows:

Our goal is to help foster a strategic, scalable and sustainable tourism industry which will contribute to the economic, cultural, and community development of the Qalipu First Nation and the Mi’kmaq People of Newfoundland and Labrador.

https://experienceqalipu.ca/

Qalipu does have a 5-year/phase Indigenous tourism strategy in place; the implementation plan for this strategy is currently in phase 2. Experience Qalipu’s top 3 priorities for supporting Indigenous tourism are:
1. Product Development – experience and skills development workshops
2. Authenticity – particularly around arts, crafts and storytelling
3. Market Readiness

No’kmaq Village has also positioned itself as a prominent Indigenous community welcoming visitors to enjoy and learn about their interesting culture. The community offers several experiences and is developing new amenities, accommodations and activities to enjoy year-round.

http://flatbay.ca/

Photo Credit: Flat Bay Band
Industry Partnerships & Collaborations

Prioritizing the formation of strategic partnerships will be a key activity moving forward to establish a strong and well-connected industry. For Newfoundland and Labrador, key partnerships may include:

- Newfoundland & Labrador Tourism
- ITAC
- All Indigenous communities in the province
- Atlantic Canada Opportunities Agency
- Regional DMOs
- Department of Tourism, Culture, Industry and Innovation
- Nunacor
- Parks Canada
- Go Western Newfoundland
- Gros Morne Institute for Sustainable Tourism

Product Development

Province wide, there are roughly 50 market-ready Indigenous-owned tourism businesses within Newfoundland and Labrador. With 2 very distinct groups of Indigenous peoples in the province, the array of Indigenous cultural tourism products and experiences is plentiful. Currently ITAC has 9 market ready products/services showcased on their website for the province; many focus on experiential cultural encounters from traditional arts and crafts, culinary experiences, storytelling and heritage interpretation, as well as outdoor adventures including hiking, camping, ocean boat trips, fishing, and hunting.

Cruise operators and sailing excursions are becoming increasingly popular in this region. These tours often highlight Indigenous culture within their itinerary. Adventure Canada, a small cruise line specializing in the region features a Greenland and Wild Labrador cruise that includes various stops throughout Labrador that are of historical importance to the Inuit, with local Inuk guides who still live the traditional hunter gatherer lifestyle. [http://www.adventurecanada.com/trip/greenland-wild-labrador-2016/](http://www.adventurecanada.com/trip/greenland-wild-labrador-2016/)

Marketing

The bulk of Newfoundland and Labrador’s marketing efforts for Indigenous tourism are taken on by ITAC through its website, publications and attendance at travel trade events. Newfoundland and Labrador Tourism, the province’s DMO, does not currently feature or highlight Indigenous experiences on its website, although the Torngat Mountains National Park is featured as a top destination, which contains spiritual and cultural sites and visitors are invited to explore the park through an ‘Inuit cultural lens.’

Experience Qalipu, developed by one of the region’s largest First Nations, is also taking a lead role in marketing Newfoundland’s Indigenous cultural experiences. Their attractive website and branding have classified Qalipu as a best practice for marketing Indigenous tourism. The website features 25 experiences and tourism amenities from trails, beaches, interpretive centres, wilderness adventures, lodges, art galleries, complementary tourism services and more. Experience Qalipu’s social media sites are populated with various events, activities and experiences. Qalipu promotes Indigenous operators and is continuing to grow its membership base.

Experience Qalipu allocates approximately $100,000 to its marketing activities annually. Most of their marketing efforts are dedicated towards building their membership of Indigenous tourism businesses, guides and operators. This process is still at the ground level as there are some 23,000 members within their community. Qalipu has just hired an experience development officer whose responsibility is to reach out to operators and help with their market-readiness. Experience Qalipu has also created some video marketing materials.

Training & Capacity Building

Building capacity within Newfoundland and Labrador’s Indigenous tourism industry is most notably being executed again by Experience Qalipu. The First Nation often hosts training programs and workshops, and recently held an Indigenous Tourism Forum. Recent workshops have focused on supporting Indigenous artists as well as improving business skills. In 2017, experience development workshops were offered by industry leaders; themes explored were Indigenous interpretation, land-based experiences, storytelling and product development.
Experience Qalipu also has a partnership with the Gros Morne Institute for Sustainable Tourism who offer training programs for sustainable tourism, and they are currently working on an Indigenous tourism training program. They have sent roughly 15 people through this program. In addition, Experience Qalipu is launching a series of 12 training sessions over the winter of 2019 which focus on passing on traditional skills and facilitation skills. This program will see experience providers working in collaboration with operators.

In February of 2018, the Newfoundland and Labrador Indigenous Tourism Forum was organized by the Indigenous groups in the province and funded through ITAC. This was an important 2-day event which saw attendance from representatives of all five Indigenous groups and partner organizations within Newfoundland and Labrador. The forum focused on identifying and uniting champions in Indigenous tourism in order to start moving the industry forward. Hearing what stakeholders, tourism businesses, partners, communities, etc. had to say was an important step in identifying the current capacity of the industry and what needs to be built up for the future.

Nunacor, the business arm of the NunatuKavut (Inuit-Metis) government contributes to the growth of the Indigenous tourism industry by supporting entrepreneurs through business counselling and other programs. In addition, Parks Canada and the Atlantic Canada Opportunities Agency provide support for building capacity within Indigenous tourism.

Organizational Budget & Funding

$60,000 was provided by ITAC in 2018 to support provincial efforts within Newfoundland and Labrador; this money is going towards the creation of the provincial Indigenous tourism strategy. ITAC also provided funds in 2018 to undertake a province-wide Indigenous tourism conference.

Experience Qalipu on the other hand receives approximately $500,000 annually to pursue its tourism initiatives for the community. The funding received is roughly broken down as follows:

- 65% from the Federal Government (Atlantic Canada Opportunities Agency and Indigenous and Northern Affairs Canada)
- 25% from the Provincial Government
- 10% from the First Nation (community/band level)

Experience Qalipu is one of the few Indigenous tourism organizations that feels that it does receive the necessary funding to support its organization. This is due to a positive relationship and effective communication with funders.

In June of 2017, the Government of Canada announced a contribution of $70,000 to establish a new Atlantic Canada chapter of the Indigenous Tourism Association of Canada. The funding was allocated through the Atlantic Canada Opportunities Agency’s Business Development Program and supports the Atlantic Growth Strategy. ITAC also contributed $30,000 towards creating a working group made up of Atlantic Canada Indigenous tourism industry representatives with the goal of creating a plan to align with the National ITAC strategy.

<table>
<thead>
<tr>
<th>Atlantic Provinces</th>
<th>Name of Representing Organization</th>
<th>NL</th>
</tr>
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<tbody>
<tr>
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<td>Qalipu FN</td>
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<td>Provincial Indigenous Tourism Contribution to GDP</td>
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<td>Funding as a Percentage of Provincial GDP</td>
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<td>Provincial Indigenous Tourism Output**</td>
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<td>$95,243,659</td>
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*Source: Canadian Ecotourism Services

**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts
3.1.10 Nunavut

Organizational Strategy

Nunavut does not have a designated territorial Indigenous tourism organization but rather falls under ITAC’s northern regional coordination. Northern Indigenous tourism activities fall under the guidance of ITAC’s 5-year strategic plan. In order to develop a unified Northern Indigenous tourism strategy, ITAC first has to look at addressing the many challenges faced in the North such as:

- The small population base and limited number of tour operators
- Making sure there is product to promote
- Making sure operators know the expectations for product and service delivery

The priorities for supporting Indigenous tourism development in the North include:
1. Resource support (finance and training)
2. Research to ensure that investments are strategically spent
3. Business development to provide the skills to entrepreneurs.

Recently, ‘Nunavut Tourism’ became ‘Travel Nunavut’ with an updated logo, website, and marketing materials, and in their words, a ‘completely overhauled’ business plan.

Travel Nunavut is a not-for-profit membership that focuses on four key areas for member betterment: marketing, research and communication, market readiness, and advocacy. Through partnerships with governments, Inuit Associations, communities, and tourism operators, it strives to promote ‘tourism opportunities that encourage sustainable economic growth, cultural preservation and sustainable social benefits for Nunavummiut.’

As of March 31, 2018, Travel Nunavut had 52 Inuit owned and 40 non-Inuit owned businesses/organizations for a total of 92 Nunavut-based members and is seeing growth year over year.

Interestingly, the organization also acts as an industry regulator, with the authority and means to engage in disciplinary action against members that do not operate in accordance with tourism industry best practices.

The Executive of the Board of Directors for Travel Nunavut consists of a Chair, Vice Chair, and Secretary/Treasurer.

Industry Partnerships & Collaborations

Travel Nunavut maintains a relationship with a variety of agencies that offer funding support for small business and encourages its members to contact these agencies as needed. For example, each region in Nunavut has a Community Futures Group that can provide financial assistance and business support; the Nunavut Business Credit Corporation (NBCC) can provide financing up to $1,000,000 to both Inuit and non-Inuit businesses based in Nunavut; the Atuqtuarvik Corporation provides loans and equity investments of up to $3,000,000 to Inuit-owned businesses; the Kakivik Association provides grants and loans to eligible Inuit businesses for pre-start up, start up and expansion activities; and Kivalliq Partners in Development provides grants for eligible Kivalliq Inuit-owned businesses to a maximum of $125,000.

As with the other provinces and territories, ITAC offers support funding for tourism product development investments designed to improve their market-ready and export-ready status to a maximum of $10,000.

Of significance given the high airfare costs to Nunavut, is the members’ Airline Discount Program. Travel Nunavut members are eligible for significantly discounted airfare on partner airlines Calm Air, Canadian North, and First Air. These discounts apply to business travel for members, and in some cases may be applicable for client travel.

Another common obstacle for small businesses is liability insurance. Travel Nunavut has partnered with HUB International to offer their members significantly reduced insurance coverage options to help mitigate this financial barrier.

Product Development

Created by Destination Canada, the Canadian Signature Experiences are a collection of extraordinary and authentically Canadian travel experiences promoted in 11 different international markets. Travel Nunavut is able to claim 6 business members of the 200 Signature Experience members across the country:

- Arctic Winter Discovery – Inukpak Outfitting
- The Spring Caribou Migration – Arctic Haven Wilderness Lodge
- Arctic Safaris in Nunavut – Arctic Watch Wilderness Lodge
- Sail the Northwest Passage – Adventure Canada
- Narwhal & Polar Bear Safari – Arctic Kingdom Polar Expeditions
- On the Floe-Edge – Black Feather Wilderness Adventures/Polar Sea Adventures
Currently Indigenous tourism product development on behalf of ITAC in Nunavut is focused on working with operators on a project-by-project basis to increase market and export-readiness. As it stands, there are less than 5 market-ready authentic Indigenous tourism products within Nunavut.

**Marketing**

ITAC is working on a series of videos to highlight Indigenous products and experiences, including those in the North.

Travel Nunavut participates in a number of travel and trade shows each year, such as the Northern Lights Conference, Kitikmeot Trade Show, Toronto Outdoor Adventure Show, and Rendez-vous Canada.

Travel Nunavut’s Marketing Assistance Program allows members to apply for a 50% reimbursement of eligible marketing expenses up to a maximum of $1,000.00 for things such as brochures, advertisements, business cards, websites, and attendance at trade shows.

Each year Travel Nunavut also invites travel writers, journalists, social media bloggers, and broadcasters to participate in FAM tours to personally promote the tourism offerings of their members’ offerings. Travel Nunavut members can participate in these tours by partnering with Travel Nunavut and offering their services at a discounted rate.

**Training & Capacity Building**

Currently Travel Nunavut is promoting Wilderness First Aid and Small Vessel Operators Proficiency training. In early 2016 Travel Nunavut printed several of their business resources, such as the Product Development Workbook, Business Aftercare Guide, and Market and Trade Ready Standards program.

Additionally, Travel Nunavut staff and Board members travel throughout the Territory to meet with members and stakeholders, offering business support and counselling, and listening to members’ needs.

**Organizational Budget & Funding**

As mentioned, ITAC coordinates Indigenous tourism activities in the North and allots funding on a project-by-project basis.
3.1.11 Northwest Territories

Organizational Strategy

Much like Nunavut, the Northwest Territories does not have a designated territorial Indigenous tourism organization but rather falls under ITAC’s northern regional coordination. Northern Indigenous tourism activities fall under the guidelines of ITAC’s 5-year strategic plan. Again, similar to Nunavut, in order to develop a unified Northern Indigenous tourism strategy, ITAC first has to look at addressing the many challenges faced in the North such as:

- The small population base and limited of tour operators
- Making sure there is product to promote
- Making sure operators know the expectations for product and service delivery

The priorities for supporting Indigenous tourism development in the North include:

1. Resource support (finance and training)
2. Research to ensure that investments are strategically spent
3. Business development to provide the skills to entrepreneurs.

Spectacular NWT is the territory’s destination marketing organization. Their Board of Directors is made of sixteen members, seven which are appointed by Indigenous Governments — indicating that Indigenous cultures are important to the Territory’s tourism plan.

Industry Partnerships & Collaborations

In the fall of 2018, a new agreement was signed that will see up to $257,000 invested annually in Indigenous tourism businesses in the Northwest Territories (NT). A Memorandum of Understanding was signed between the Government of the Northwest Territories’ Department of Industry, Tourism and Investment (ITI), the Indigenous Tourism Association of Canada (ITAC), and Northwest Territories Tourism (NWTT).

These funds will be put towards supporting the community of LutselK’e to test and finalize visitor day packages; to assist the Yellowknife’s Dene First Nation to train staff and develop demonstrations and promotional materials for upcoming craft store and visitor centre; and to provide business, market and trade-ready standards workshops, as well as Indigenous tourism development workshops throughout the NWT.

Product Development

In most communities of the North, Indigenous peoples comprise the majority of population. NT has one of the highest populations of Indigenous people in Canada. Considering its small population, the North possesses several notable Indigenous tourism businesses.

Several of the Indigenous tourism offerings in the NT are presented as packages as well as single activities. For example, the Thaidene Nene Experience through North Star Adventures provides a tour of the East Arm of Great Slave Lake with Indigenous guides who grew up in the area.

Their package includes guides, exposure to genuine Indigenous culture, boating, a bush plane flight, 4 nights of accommodations, plus traditional games, storytelling, and food.

By comparison, B. Dene Adventures offers a wide array of activities and camps that can be booked individually or packaged together for a custom experience. They offer camps geared towards berries and medicine, winter survival, hide tanning, trapping and snaring, traditional games, and more.

Most of what they offer as cultural tours range from 2 to 4 hours in duration, and include ground transportation, sight-seeing, and demonstrations of various aspects of Dene culture.

ITAC’s website highlights 7 different tour companies in the NT:

- Aurora Tours
- Aurora Village
- Bathurst Inlet Lodge
- Narwal Northern Adventures
- Northstar Adventures
- True North Safaris
- Tundra North Tours

Photo Credit: Aurora Village
They include First Nations, Inuit, and Metis cultures, and most offer multiple day packages. For some, traditional culture is very much the main focus of their offerings, while for others a cultural component appears to be more of an add-on to hunting, fishing, or adventure-type activities.

Currently product development on behalf of ITAC in the North is focused on working with operators on a project-by-project basis to increase market and export-readiness.

Marketing

The governments of the NT and NU actively market their Indigenous cultures. In the NT 2020 Tourism Strategy, one of the department’s primary focuses is on Indigenous cultural tourism. As stated by the government, a NT Indigenous cultural tourism experience is as follows:

An experience offered to a visitor in a manner that is appropriate, respectful and true to the culture of the Indigenous people of the Northwest Territories. This experience and the people who deliver it has been endorsed by the Indigenous organizations whose culture is being represented. Authenticity is ensured through the active involvement of Indigenous people in the development and delivery of the experience.

Currently, ‘Spectacular NWT’ promotes Indigenous cultural activities, but they are combined under the heading Culture and Touring. A sub-heading called Cultural Experiences offers a dynamic description of a variety of cultural activities, though it can be difficult to find Indigenous operators on the website without quite a bit of searching. Cultural experiences are described in general terms, and it is noted that some fishing and hunting outfitters are Indigenously owned.

ITAC is working on a series of videos to highlight Indigenous products and experiences, including those in the North.

Training & Capacity Building

There are no training programs specifically geared towards the development of Indigenous tourism, however there is one notable program offered in NT that could contribute to the growth of the industry.

The Business, Market and Trade Ready (BMT) program offered by the Government of Northwest Territories prepares tourism operators to access new marketing and distribution sales channels. This program accentuates the importance of being business ready, market ready and trade ready. The program is available online or can be taken as an in-person workshop.

These types of programs could be modified to specifically deal with Indigenous tourism operators.

Organizational Budget & Funding

As mentioned, ITAC coordinates Indigenous tourism activities in the North and allots funding allowances on a project-by-project basis.

The MOU signed in September of 2018 could see up to $270,000 annually invested into Indigenous tourism in NWT.

<table>
<thead>
<tr>
<th>Northern Province</th>
<th>ITAC</th>
</tr>
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<tbody>
<tr>
<td>Name of Representing Organization</td>
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<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$262,143,675</td>
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</tbody>
</table>

*Source: Canadian Ecotourism Services
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts
3.1.12 Yukon

Organizational Strategy

The Yukon First Nations Culture and Tourism Association (YFNCT) is the territory’s body representing and supporting the growth of Indigenous tourism in the region. The organization was officially established in 1994, making it one of Canada’s oldest Indigenous tourism organizations and very much ahead of its time. Back then, it was known as the Yukon First Nations Tourism Association; however due to lack of operational funds, receiving core funding of only $60,000/year, the organization was forced to go dormant.

In 2012, discussions were initiated around launching the Adäka Cultural Festival as a production of the YFNCT, which soon became the case. The Adäka Cultural Festival is an internationally renowned, multi-disciplinary event celebrating First Nations art and culture. The weeklong event is now in its 8th year and welcomes artists from around the world.

YFNCT has 5 full time and 1 part time staff members as well as 9 Board members made up of Elders, artists and professionals representing various Indigenous communities from across the Yukon. YFNCT hires additional summer staff to support the annual delivery of the Adäka Cultural Festival, as well as on a project-by-project basis.

YFNCT aims to:

- Promote at all times the respect for the traditional territories of Yukon First Nations
- Educate the public where possible on the importance of traditional knowledge and its proper use
- Provide a unified voice for Yukon First Nation arts, cultural centres and tourism providers
- Advocate, where appropriate, for the advancement of Yukon First Nation art, culture and tourism
- Provide marketing and communication supports and opportunities to inform the public’s understanding and awareness for Yukon First Nation arts, culture and tourism experiences in and beyond the Yukon
- Support and promote the development, enhancement and presentation of authentic Yukon First Nation arts, culture and tourism products and experiences
- Promote and support strong partnerships and networking opportunities for Yukon First Nation artists, tourism providers and sector stakeholders to promote collaboration and resource sharing
- Carry out such other functions, activities and responsibilities as may be necessary to fulfill the objectives listed above

The YFNCT’s strategic pillars for supporting Indigenous tourism in the region are as follows:

1. Leadership
2. Research
3. Partnerships
4. Development
5. Marketing

The YFNCT’s membership structure is described below:

<table>
<thead>
<tr>
<th>Organization</th>
<th># of Membership Tiers</th>
<th>Membership Categories (Non-Indigenous)</th>
<th>Requirements for Voting Status</th>
<th>Membership Fees</th>
<th>Membership Product Offerings</th>
</tr>
</thead>
</table>
| Yukon First Nation Cultural Tourism | 4                     | 1. ARTISTS                             | Must be majority Indigenous owned/controlled | $25 to $250 depending on type and size of organization | Enhanced membership option includes:  
  - Partnership Opportunities  
  - Voting Rights  
  - Business Referrals to Media & Trade by YFNCT  
  - Contribute to Newsletter  
  - Promotional Opportunities  
  - Access to Markets, Events & TradeShows  
  - Discounts on Workshop Fees  
  - Professional Development Support  
  - Access to YFNCT Stakeholder Database  
  - Access to YFNCT Research |
Industry Partnerships & Collaborations

As with all other Indigenous tourism organizations, the YFNCT believes that facilitating strong partnerships is critical to achieving strategic goals and objectives. As stated by the organization, ‘We as members of the YFNCT believe that it is important to build strong and effective relationships with Yukon First Nations, all levels of governments and with arts, culture and tourism associations to achieve and implement our vision of advancing the arts and culture of Yukon First Nation communities.’

Some of the YFNCT’s most important partners include:

- All 14 of Yukon’s First Nations Governments & Communities
- Indigenous Tourism Association of Canada (ITAC)
- Yukon Government Department of Tourism & Culture
- Yukon Government Department of Economic Development
- Canadian Northern Economic Development Agency (CANNOR)
- Canadian Heritage
- Arts & Culture Organizations
- Cultural Centres
- Yukon First Nations culture & tourism businesses
- Yukon First Nations Development & Community Corporations
- Yukon First Nations Chamber of Commerce
- Tourism Industry Association of Yukon
- Wilderness Tourism Association of Yukon
- And More

In December of 2018, YFNCT hosted its 2nd Advancing Indigenous Tourism Conference, which brought together delegates from culture, tourism, economic development and education sectors to explore creating an Indigenous tourism model for Yukon.

During the conference, the Government of Yukon, ITAC and YFNCT signed an MOU, which sets the foundation for a collaborative partnership with the shared goal of creating opportunities to grow Indigenous tourism in a way that will increase economic benefits and overall wellbeing to Yukon First Nations communities and Indigenous entrepreneurs.

Product Development

Providing a sufficient array of high-quality products, services and experiences is critical to any destination and implementing the systems to support these products will ensure its sustainability. There are currently approximately 45 Indigenous owned tourism businesses in Yukon at various levels of development. There are also 8 cultural and interpretive centres and 6 festivals. Only a small number of these (approximately 7) are considered export ready based on ITAC’s export ready criteria. The interest in Indigenous cultural experiences has seen a significant increase recently and will likely continue to grow.

In addition to these numbers, there are many local Yukon First Nations and Indigenous artists that sell their products to tourists at local markets/shops or privately.

For YFNCT, Product Development efforts and goals will focus on three main areas:

Community Tourism Development:

Community-based tourism promotes the collective engagement of local based businesses, artists and cultural centres involving the entire community in the process, rather than focusing on single businesses. Community-based tourism is developed, informed and managed by the residents of the community, with the overall goal of making the community a better place for businesses and individuals to develop tourism.

Business Development:

Business development focuses on providing assistance to Yukon First Nations and Indigenous businesses that require support to advance their tourism and business objectives. This may include (but is not limited to) training on product pricing, financial management, market-ready and export-ready guidelines, marketing, and how to develop a business and marketing plan. These trainings will also include information on what resources are available to support the individual(s) looking to start a new business or expand an existing business and connect them with the resources that are out there.

YFNCT will work in partnership with other agencies providing business development support to deliver business training.

Experience Development:

Experience development will provide Yukon First Nations communities and Indigenous operators and businesses with the skills to enhance their tourism product. Experience development may include training on tourism specific skills (e.g. interpretive guiding, food safe), itinerary development (both multi-day and for a single program), package development, and more. Experience development trainings are designed to help the tourism operator or business to differentiate their experience from businesses with similar offerings.
Part of YFNCT’s current work to enhance Indigenous product development within the Yukon is a series of community visits and workshops to:

- Better inform communities and individuals about the programs and support services offered by YFNCT and;
- Connect with individuals and entrepreneurs interested in tourism and build an inventory of existing and potential Indigenous tourism businesses and experiences that can be developed/expanded.

In the coming year, YFNCT is also planning to undertake research to further inform our development goals. Research goals include:

- Establish a baseline of the number of market-ready and export-ready tourism operators and artists in the Yukon and then monitor annually to determine level of growth.
- Establish a baseline for the annual estimated Indigenous tourism and arts expenditures in the Yukon and monitor annually.
- Establish a baseline for the number of jobs created in the Yukon that are specifically related to the Indigenous tourism and cultural sectors and monitor annually.

Currently, many of the Yukon’s main Indigenous tourism products/experiences are made up of the following experiences:

- Land-based activities – travelling land and river routes (walking/hiking tours, boat tours, snowmobile tours, wilderness accommodations/adventure, fishing, etc.)
- Visiting heritage/cultural centres – viewing exhibits, art galleries, participating in cultural programs, etc.
- Artistic performances and cultural events.

Kwáday Dän Kenji (Long Ago People’s Place) has been operating in Champagne, Yukon for almost 25 years. The camp has recreated a Southern Tutchone village nestled in the woods, and they offer walking interpretative tours to many Yukon visitors and an outdoor kitchen for sitting and enjoying hot tea/bannock. A short walk into the woods will bring you back in time when only wood, stone and animal parts were used to create everything our Southern Tutchone culture needed. From animal and fish traps, to housing and storage structures, you will learn and be amazed at the ingenuity that our ancestors had to make life vibrant in the far north. They also offer camping facilities and are currently working on creating some traditional accommodations. This camp is designed for those who want to get off the beaten trail and find authentic experiences. For more information, please visit http://yukonfirstnationculture.com.

Marketing

The YFNCT is the territory’s primary organization in charge of marketing and ensuring visibility of the Yukon’s Indigenous tourism products and services. The organization focuses their marketing efforts on promoting their member businesses, festivals, experiences, etc. as a priority, versus marketing to secure more members of YFNCT. https://www.travelyukon.com/sites/default/files/planners/2018-05/YFNCTWelcomeGuide.pdf

YFNCT aims to promote Indigenous tourism experiences in Yukon through 4 main distribution channels. These include consumer direct, travel trade, travel media and meeting and convention travel (MCIT). To maximize market reach, YFNCT endeavours to partner with Travel Yukon, Destination Canada and ITAC on cooperative advertising programs, industry events, trade shows and digital assets.
Producing the 2018 Yukon First Nations Welcome Guide was a step forward for marketing the region’s First Nations communities and Indigenous tourism experiences. The guide itself not only highlights ‘things to do’ but takes a thoughtful approach to educating readers and sharing the Indigenous culture of the region highlighted by storytelling and information on each community. This project was largely funded by the territorial and federal governments, initiated by the growing demand and interest in Yukon’s First Nations cultures. Prior to this publication, the last time a Guidebook to Yukon First Nations was released was in 2001.

The YFNCT’s organizational marketing budget is around $10,000 annually. However, the Adäka Cultural Festival (a major multidisciplinary First Nations arts and cultural festival produced by the organization) has its own marketing budget, which totals approximately $30,000 annually.

Training & Capacity Building

Training programs for Indigenous tourism development are again, handled primarily by the YFNCT. They do offer skills-based training and product development training for artists and tourism businesses. Recently the YFNCT hosted a 2-day tourism marketing workshop geared towards cultural centres and Indigenous tourism businesses.

Additionally, YFNCT regularly offers one-on-one business support to individuals who are interested in starting or growing a cultural/tourism business. This includes support with funding applications, understanding visitor, market and export ready guidelines, authenticity guidelines, marketing support, experience development and more.

YFNCT also offers a range of training and capacity building opportunities to artists. This includes skill development workshops, marketing support, and support to help artists establish stable market value for their products through promotion and education to consumers.

A notable pilot project was completed in the Spring of 2018, where 6 First Nations youth participated in a 4-week wilderness guiding and cultural interpretation training program. The objective of the program was to prepare more Indigenous guides for opportunities in wilderness tourism, including building the skills that would allow them to compellingly share their stories with visitors. The participants received industry-standard certifications such as Wilderness Advanced First Aid, Swiftwater Rescue and were instructed by Indigenous Elders and Knowledge Keepers about cultural teachings and protocols that will help them with their interpretation skills. At the end of the program, the participants had the opportunity to complete a paid internship with wilderness tourism businesses. This training program addressed a direct need within the industry by training youth for culture-focused wilderness tourism opportunities.

Organizational Budget & Funding

As the organization representing and supporting Indigenous tourism development in Yukon, the YFNCT receives its operational funding from the Yukon government in the quantity of $160,000 a year, which was increased in 2016 from $60,000. In the new fiscal year (2019/20) Yukon Government has committed an additional $300,000 to YFNCT to support the advancement of Indigenous tourism development.

In addition, the YFNCT is coming to the end of a funding agreement with CANNOR, which provided $1 million over 3 years to the organization. The reapplication and renegotiating process is currently underway for a renewed funding term.

YFNCT receives $65,000 annually from ITAC, which also supports its organizational funding. This grant will be reduced to $55,000 annually based on a new funding model recently implemented by ITAC. For all other projects or undertakings of the YFNCT, individual funding applications must be completed. This is a burden and taxing on the organization’s limited human resource capacities. YFNCT desires more consistent funding and multi-year agreements so as not to constantly be completing funding applications.

Funding received from all sources is currently insufficient for the YFNCT to continue to grow, promote and support Indigenous tourism development in the Yukon.

<table>
<thead>
<tr>
<th>Name of Representing Organization</th>
<th>Northern Province</th>
<th>YT</th>
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<tbody>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
<td>$560,000</td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to GDP</td>
<td>$35,165,217</td>
<td></td>
</tr>
<tr>
<td>Funding as a Percentage of Provincial GDP</td>
<td>1.59%</td>
<td></td>
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<tr>
<td>Number of Employees</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to Employment</td>
<td>758</td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$83,539,135</td>
<td></td>
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</tbody>
</table>

*Source: Canadian Ecotourism Services

**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts
3.2 Jurisdictional Scan Summary

Below is a summary of the findings acquired during the jurisdictional scan summary.

<table>
<thead>
<tr>
<th>British Columbia Indigenous Tourism Association of BC (ITBC)</th>
<th>Alberta Indigenous Tourism Alberta (ITA)</th>
<th>Saskatchewan Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITBC’s Blueprint Strategy is the foundational guiding document, which is based on research and still guides the work of the organization and has helped to secure crucial funding. ITBC advocates on behalf of the Indigenous tourism industry to ensure the right social, economic environmental conditions are in place. ITBC uses a strong approach to performance measurement, ensuring that it achieves desired results. ITBC is operated by 8-9 core employees.</td>
<td>The single fundamental objective for ITA is to ‘align the efforts and interests of Alberta’s tourism industry under a common Indigenous tourism strategy’. ITA has targets of growing Alberta’s Indigenous Tourism economy by $35M (+25%) by 2024, and to increase provincial Indigenous tourism market-ready businesses from 66 to 100 (+52%) in that same time period. ITA is operated by 1 employee.</td>
<td>The execution of the International Indigenous Tourism Conference that was held in Saskatoon in 2018 has kick-started activities and has produced an increased awareness and interest in developing the province’s Indigenous tourism resources. ITAC and its regional coordinator for Saskatchewan are working on a provincial strategy with plans for completion within the first quarter of 2019.</td>
</tr>
<tr>
<td>One of ITBC’s most important partnerships is with Destination BC, with whom they have a long-term funding agreement and a healthy working relationship that encourages collaboration and strategy alignment. ITBC’s strong partnership with the BC Ministry of Tourism, Arts and Culture ensures that Indigenous tourism is a priority and not just an after-thought. The First Nation Leadership Council of BC has delegated ITBC as the official body representing Indigenous tourism in BC on behalf of all Indigenous communities.</td>
<td>ITA’s strategic partners include Travel Alberta, Destination Canada, Indigenous Tourism Association of Canada, Alberta Culture and Tourism, Statistics Canada, Tourism HR Canada, the Conference Board of Canada, and various tourism marketing partners at the provincial and regional levels.</td>
<td>Pursuing strategic partnerships and collaborations within the province are a key initiative being undertaken by ITAC. A partnership with Tourism Saskatchewan seems promising as a new award was announced for an outstanding Indigenous tourism experience at the annual 2019 Saskatchewan Tourism Awards.</td>
</tr>
<tr>
<td>ITBC has developed a tier system to classify the 3 development stages for Indigenous tourism products: start-up, existing but not market ready and market ready. For each of the 3 tiers, ITBC recommends a series of programs that will strengthen and spur the growth of the Indigenous tourism industry, that are tailored to each tier’s specific needs. ITBC’s experience/product development initiatives for 2017/18 are: using a regional approach, training and capacity building, push for market-readiness and destination development.</td>
<td>ITA classifies its Indigenous tourism products as either export-ready, market-ready, or developing; the current inventory</td>
<td>Wanuskewin Heritage Park is undoubtedly the province’s most well-known Indigenous tourism facility and cultural learning centre, a best practice for Indigenous tourism. Indigenous tourism businesses in Saskatchewan are classified: 32% as ‘doors open’, 40% as ‘visitor ready’, 27% as ‘market ready’ and 1% as ‘export ready’.</td>
</tr>
</tbody>
</table>
### British Columbia
Indigenous Tourism Association of BC (ITBC)

- Approximately 50% of ITBC’s $450,000 annual marketing budget is dedicated towards promoting market-ready products and the other 50% are targeted towards building ITBC’s membership.
- ITBC is pursuing a strong digital marketing strategy which includes curating digital storytelling, virtual Indigenous tourism kiosks, web data analytics and mobile apps.
- Traditional marketing campaigns are also important such as working with travel trade, travel media and attending industry events.

### Alberta
Indigenous Tourism Alberta (ITA)

- In its marketing, ITA endeavours to combat the perception that all Indigenous cultures are the same and rather highlight the history of each distinct region and Nation in the province (48 in total) yet connect them into one overall Indigenous tourism story to be used as the primary marketing premise.
- ITA will offer cultural awareness training to their Destination Marketing (DMO) partners and stakeholder to ensure all development and marketing are delivered in a culturally sensitive manner.
- Capacity building opportunities for Indigenous tourism businesses will include ongoing training and support programs, Indigenous Tourism Readiness Guide and workshops and an annual Tourism Summit for Indigenous operators.

### Saskatchewan
Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)

- As Indigenous tourism development is in its early stages in Saskatchewan, the focus of marketing activities is centred upon creating strong partnerships that will help to promote Indigenous operators, businesses, products, services and experiences.
- Capacity building programs for Indigenous tourism are minimal in Saskatchewan, however in 2018 ITAC hosted Saskatchewan Day which saw 145 Indigenous tourism entrepreneurs, community leaders and tourism partners gather to discuss the priorities and potential challenges for growing the industry.

### Training & Capacity Building

#### ITBC
- ITBC offers 12 different capacity building programs aimed at targeting the different needs of entrepreneurs and communities.
- The most popular of ITBC’s training programs are: Cultural Interpretation Training, Community Tourism Engagement Session and the First Hosts Front Line Service Training.

#### ITA
- The Alberta Government has contributed $315,000 to the creation of ITA, with Travel Alberta contributing an additional $50,000.
- The Alberta Government has contributed $315,000 to the creation of ITA, with Travel Alberta contributing an additional $50,000.
- Targets of approximately $2 million/year in sustainable operating funding will need to be secured through long-term partnerships.

### Organizational Budget & Funding

#### ITBC
- In 2017/18, ITBC received a total government contribution of $2,151,500 for its operations, of which $1M came from Destination BC.
- This amount is not sufficient to fully support the needs of the organization as ITBC represents the Indigenous tourism assets of the entire province.
- ITBC is grateful to have been able to secure multi-year funding agreements.

#### ITA
- The Alberta Government has contributed $315,000 to the creation of ITA, with Travel Alberta contributing an additional $50,000.
- Targets of approximately $2 million/year in sustainable operating funding will need to be secured through long-term partnerships.
| **Manitoba**
Regional Coordination under the Indigenous Tourism Association of Canada (ITAC) | **Quebec**
Quebec Aboriginal Tourism (QAT) & Cree Outfitting and Tourism Association (COTA) | **New Brunswick**
Representative Organization: Metepenagiag Heritage Park |
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<tbody>
<tr>
<td><strong>Organizational Strategy</strong></td>
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<tr>
<td>- ITAC and its regional coordinator for Manitoba are working on a provincial strategy with plans for completion within the first quarter of 2019.</td>
<td>- QAT is the sectoral tourism organization recognized by Tourisme Québec as the official representative of Quebec’s Indigenous tourism industry.</td>
<td>- Metepenagiag Heritage Park marks the site of a 3,000-year-old Indigenous community with archaeological displays, historic Mi’kmaq ceramic pottery, and interpretation on the significance of the Augustine Mound and the Oxbow National Historic Sites.</td>
</tr>
<tr>
<td><strong>Partnerships &amp; Collaborations</strong></td>
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</tr>
<tr>
<td>- In the fall of 2017, ITAC and Travel Manitoba agreed to a 3-year MOU to help grow the province’s Indigenous tourism industry.</td>
<td>- QAT represents its members on over 10 provincial and national committees and partnerships.</td>
<td>- Metepenagiag Heritage Park partners with Discover Miramichi, ITAC, the University of New Brunswick, Tourism Industry Association of New Brunswick, Atlantic Canada Opportunities Agency, and the Association of Museums New Brunswick.</td>
</tr>
<tr>
<td><strong>Product Development</strong></td>
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<tr>
<td>- For 2019, ITAC is working on getting 5 existing tour operators in Manitoba up to market-ready status and 5 market-ready businesses up to export-ready. ITAC is also working with businesses who are in the idea stage get up to market-readiness.</td>
<td>- In addition to ongoing support for entrepreneurs, QAT assisted Parks Canada and INAC in developing Indigenous product offerings for the cruise ship industry for 5 different communities/regions.</td>
<td>- In 2017 the Tourism Industry Association of NB (TIANB) signed an MOU with ITAC.</td>
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<tr>
<td></td>
<td>- COTA focuses on supporting its members by way of training, funding and product development, while its sister organization Eeyou Istchee Tourism (EIT) is more focused on marking and promotion.</td>
<td>- Metepenagiag Park is a best practice for product development in NB offering archaeological displays, interpretive tours and trails, traditional culinary experiences, storytelling and a Mi’kmaq boutique. Unique accommodations, Red Bank Lodge is within walking distance.</td>
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<tr>
<td></td>
<td>- COTA is operated by 13 staff</td>
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</tbody>
</table>
### Manitoba

**Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)**

- A few festivals, events and art galleries/craft shops are presented on the Travel Manitoba website for Indigenous tourism.

### Quebec

**Quebec Aboriginal Tourism (QAT) & Cree Outfitting and Tourism Association (COTA)**

- QAT operates a robust marketing strategy for representing its members. This includes television shows, print media, web and print advertising aimed at overseas markets, social media, trade shows, FAM and press tours; and lastly their own magazine publication, Origine.
- COTA also implements thorough traditional and digital marketing strategies; the most notable campaign is called ‘Into the North’

### New Brunswick

**Representative Organization: Metepenagiag Heritage Park**

- Currently, Indigenous tourism businesses in the province are promoted and marketed through ITAC, TIANB, Tourism New Brunswick, and through their own websites and marketing media.

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### Marketing

- ITAC’s operations in Manitoba will engage in ongoing conversations with Indigenous tourism businesses to ensure they have access to training, support and are aware of funding that may be available to them.

### Training & Capacity Building

- QAT provides workforce professionalism guidance for nature and adventure tourism, and for Indigenous outfitting businesses. They also offer up to $10,000 per applicant to assist with product development, marketing, etc.
- QAT also provides online mentoring for youth and has offered a Nature and Adventure Training Course.
- COTA offers regular training programs such as: a recent 5-day Cree Entrepreneur Bootcamp and one-on-one assistance for entrepreneurs through their Product Development Coaching Program.
- COTA & EIT provide free online training for individuals to increase front-line employees’ tourism-related skills.
- COTA has also coordinated an 8-hour First Host hospitality workshop in various communities, along with Advanced Wilderness First Aid Training, French language teaching, Food Safety & Hygiene, and the development of Cree Entrepreneur Kits.

### Organizational Budget & Funding

- ITAC has committed $350,000 over 3 years to a new Manitoba Indigenous Tourism Strategy and business plan for a future Manitoba Indigenous Tourism Association

- QAT receives approximately $1.3M in government funding.
- QAT has signed an MOU with ITAC with contributions of $200,000 from ITAC and $800,000 from QAT so that the two organizations can work collaboratively to leverage resources, divide marketing tactics, direct funding requests, and establish a structure for ongoing translation services on all official documentation.
- COTA and EIT together received a total of $2,587,276 for operations in 2017-18 which was largely made up of contributions from various levels of government, along with almost $200,000 in revenue from the territory.

- In 2018, ITAC hosted a Best Practice Mission to Wendake, Quebec with the Province of New Brunswick, the Atlantic Canada Opportunities Agency and Indigenous representatives.

- A total of $8.1 million was contributed by the Provincial and Federal Governments for the creation of Metepenagiag Park: $6.6 million going towards construction and remaining $2 million towards operational funding for 10 years.
<table>
<thead>
<tr>
<th>Nova Scotia</th>
<th>PEI</th>
<th>Newfoundland &amp; Labrador</th>
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</thead>
<tbody>
<tr>
<td><strong>Nova Scotia Indigenous Tourism Enterprise Network (NSITEN)</strong></td>
<td><strong>Representative Organization: Lennox Island First Nation</strong></td>
<td><strong>Representative Organization: Experience Qalipu</strong></td>
</tr>
<tr>
<td><strong>Organizational Strategy</strong></td>
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</tr>
<tr>
<td>- NSITEN is a volunteer-based not-for-profit cultural tourism organization that supports businesses and community enterprises.</td>
<td>- The Mi’kmaq community of Lennox Island is championing Indigenous tourism on the island.</td>
<td>- Qalipu First Nation, which is made up of 66 traditional Mi’kmaq communities, is leading the way for Indigenous tourism development in Newfoundland and Labrador.</td>
</tr>
<tr>
<td>- NSITEN’s operational strategy is based on ITAC’s 4 pillars: development, marketing, leadership and partnerships.</td>
<td></td>
<td>- Experience Qalipu, the community’s tourism department, has a 5-year/phase Indigenous tourism strategy in place, which prioritizes product development, authenticity and market readiness.</td>
</tr>
</tbody>
</table>

| **Partnerships & Collaborations** | | |
| - In 2018, an MOU was signed between NSITEN and ITAC to continue to grow authentic Indigenous tourism businesses in Nova Scotia. | - Mi’kmaq Confederacy of PEI has established a partnership with Parks Canada with the goal of actively engaging PEI First Nations in the management of PEI National Park and National Historic Sites. | - There also exists a volunteer provincial working group/steering committee comprised of individuals from all of the 5 nations within the province who oversee the development of Indigenous tourism on a provincial level as part of ITAC’s presence in the province. |

<p>| <strong>Product Development</strong> | | |
| - One of the recent successes for Indigenous tourism in Nova Scotia is a unique and hands-on tour offered by Eskasoni Cultural Journeys. | - Lennox Island is home to a cultural centre and hosts visitors to participate in traditional craft making, cultural cuisine and other experiential activities. | - Province wide, there are roughly 50 market-ready Indigenous-owned tourism businesses within Newfoundland and Labrador. |
| - As it stands, there are currently 5-10 marketing ready Indigenous tourism products that can be promoted in Nova Scotia. | - The Charlottetown waterfront will soon see a new Urban Indigenous Centre providing a venue for business skills development, cultural tourism and social enterprises. | - Experience Qalipu promotes many Indigenous tourism operators and partners on its website, providing information and access to their services. |
| - NSITEN’s Mi’kmaq Cultural Authenticity Arts and Crafts Coop provides free support services to cultural music performers, craft makers, artisans, dancers, and Traditional Knowledge Keepers. | | - Cruise operators and sailing excursions are becoming popular in this region. |</p>
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<td>Representative Organization: Lennox Island First Nation</td>
<td>Representative Organization: Experience Qalipu</td>
</tr>
<tr>
<td><strong>Marketing</strong></td>
<td>Lennox Island has their own modern website, advertises in the Welcoming PEI magazine and has received foreign travel writers.</td>
<td>Experience Qalipu is taking a lead role in marketing NL’s cultural tourism assets, featuring 25 experiences on its attractive and well branded website.</td>
</tr>
<tr>
<td>• NSITEN dedicates approximately $5,000 (8% of their organizational budget) to their marketing budget each year.</td>
<td>• Experience Qalipu allocates approximately $100,000 to its marketing activities annually most of which is dedicated towards building their membership of businesses and operators.</td>
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<tr>
<td>• Approximately 75% of NSITEN’s marketing efforts are dedicated towards building their membership and the remaining 25% towards promoting market-ready products and services.</td>
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<tr>
<td><strong>Training &amp; Capacity Building</strong></td>
<td>There are minimal initiatives currently in PEI related to training and capacity building for Indigenous tourism</td>
<td>Experience Qalipu often hosts training programs and workshops, which recently have focused on supporting artists and improving business skills; they also recently held an Indigenous Tourism Forum. They are launching a series of 12 training sessions over the winter of 2019</td>
</tr>
<tr>
<td>• For 2019, NSITEN will focus on human resource and Board development. They will also support training for Indigenous workers in tourism.</td>
<td>• Experience development workshops offered by Qalipu focus on themes such as Indigenous interpretation, land-based experiences, storytelling and product development.</td>
<td>Experience Qalipu also has a partnership with the Gros Morne Institute for Sustainable Tourism which offers training programs.</td>
</tr>
<tr>
<td><strong>Organizational Budget &amp; Funding</strong></td>
<td>In 2018, Lennox Island First Nation received a total of $55,500 to support its organizational operations relating to tourism. $28,000 was received from Indigenous and Northern Affairs Canada (INAC) and a total of $27,500 from the Government of PEI</td>
<td>Experience Qalipu receives approximately $500,000 annually to pursue its tourism initiatives for the community, as follows: 65% from the Federal Government, 25% from the Provincial and 10% from the First Nation.</td>
</tr>
<tr>
<td>• ITAC currently provides NSITEN with annual organizational support funding of $65,000</td>
<td>• In 2018, Lennox Island First Nation received a total of $55,500 to support its organizational operations relating to tourism. $28,000 was received from Indigenous and Northern Affairs Canada (INAC) and a total of $27,500 from the Government of PEI</td>
<td>• In 2018, ITAC provided $65,000 to support provincial efforts within Newfoundland and Labrador; this money is going towards the creation of the provincial Indigenous tourism strategy.</td>
</tr>
<tr>
<td>Organizational Strategy</td>
<td>Northwest Territories</td>
<td>Yukon</td>
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<td>Nunavut does not have a designated territorial Indigenous tourism organization but rather falls under ITAC’s northern regional coordination.</td>
<td>Northwest territories does not have a designated territorial Indigenous tourism organization but rather falls under ITAC’s northern regional coordination.</td>
<td>The YFNCT’s top 3 organizational priorities are: completing an organizational strategy, commencing a series of visits to the Indigenous communities and enhancing marketing capacities.</td>
</tr>
<tr>
<td>Travel Nunavut is a not-for-profit membership that focuses on four key areas for member betterment: marketing, research and communication, market readiness, and advocacy.</td>
<td>The priorities for supporting Indigenous tourism development in the North include resource support (finance and training), research to ensure that investments are strategically spent and business development to provide the skills to entrepreneurs.</td>
<td>YFNCT is operated by 4 permanent staff members</td>
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<table>
<thead>
<tr>
<th>Partnerships &amp; Collaborations</th>
<th>Northwest Territories</th>
<th>Yukon</th>
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<tbody>
<tr>
<td>Through partnerships with governments, Inuit Associations, communities, and tourism operators, Travel Nunavut provides member benefits such as product development, funding and business support, discounted airfare for members and their clients and reduced insurance coverage costs.</td>
<td>In fall of 2018, an MOU was signed between the Government of the Northwest Territories’ Department of Industry, Tourism and Investment (ITI), the Indigenous Tourism Association of Canada (ITAC), and Northwest Territories Tourism (NWTT).</td>
<td>In late 2018, Government of Yukon, ITAC and YFNCT signed an MOU which sets the foundation for a collaborative partnership.</td>
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<tr>
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<td>YFNCT has many important partnerships including Yukon Travel, Tourism Industry Association of Yukon, all 14 of Yukon’s First Nations and culture, arts and heritage organizations</td>
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<tbody>
<tr>
<td>Travel Nunavut has a membership base of 52 Inuit owned and 40 non-Inuit owned businesses/organizations</td>
<td>Currently product development on behalf of ITAC in the North is focused on working with operators on a project-by-project basis to increase business readiness.</td>
<td>YFNCT’s product development efforts are focused on 3 main areas: community tourism development, business development and experience development.</td>
</tr>
<tr>
<td>Currently Indigenous tourism product development on behalf of ITAC in Nunavut is focused on working with operators on a project-by-project basis to increase market and export-readiness</td>
<td>There are several businesses in NWT that provide land-based experiences with a cultural component.</td>
<td>In order to enhance Indigenous product development within the Yukon, the YFNCT is looking forward to starting a series of visits to the communities with the goal of connecting with individuals and entrepreneurs who are interested in tourism.</td>
</tr>
<tr>
<td>Nunavut Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)</td>
<td>Northwest Territories Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)</td>
<td>Yukon Yukon First Nations Culture &amp; Tourism Association (YFNCT)</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
| **Marketing**  
- Travel Nunavut participates in a number of travel and trade shows each year, invites writers to participate in FAM trips in Nunavut and offers a Marketing Assistance Program for its members.  
- The Government of NWT and the territory’s DMO, ‘Spectacular NWT’, promote Indigenous cultural activities to visitors.  
- The YFNCT’s organizational marketing budget is around $10,000 annually, which focuses on promoting members. However, the Adäka Cultural Festival has its own marketing budget which totals approximately $30,000 annually.  
- Produced by YFNCT, the 2018 Visitor Guide of Yukon First Nations was a step forward for marketing the region’s Indigenous tourism experiences. | **Training & Capacity Building**  
- Currently Travel Nunavut is promoting Wilderness First Aid and Small Vessel Operators Proficiency training.  
- Additionally, Travel Nunavut staff and Board members travel throughout the Territory to meet with members and stakeholders, offering business support and counselling, and listening to members’ needs  
- The Business, Market and Trade Ready (BMT) program offered by the Government of Northwest Territories prepares tourism operators to access new marketing and distribution sales channels  
- YFNCT offers skills-based, marketing and product development training for artists and tourism businesses.  
- YFNCT regularly offers one-on-one business support to individuals  
- In the spring of 2018, YFNCT hosted 6 First Nations youth who participated in a 4-week wilderness tourism training course. | **Organizational Budget & Funding**  
- ITAC coordinates Indigenous tourism activities in the North and allots funding on a project-by project basis.  
- Up to $257,000 will invested annually in Indigenous tourism businesses in the Northwest Territories according to a new agreement between the Territorial Government, ITAC and Norwest Territories Tourism.  
- YFNCT receives just under $560,000 annually of fairly predictable funding; this comes from the Yukon government and the Federal government and ITAC.  
- More consistent funding and multi-year agreements would be less taxing on organizational operations |

---

Ontario’s Indigenous Tourism Landscape Foundational Research Study 2019 | CES
1.2 Priorities for Indigenous Tourism Associations

Each of the leaders of Indigenous tourism association with whom the research team spoke with, were asked what their organization’s top 3 priorities for supporting Indigenous tourism are. The following responses were gathered from the following select provinces.

**British Columbia**
1. Marketing – digital marketing from curating digital storytelling to virtual kiosks to data analytics
2. Experience development – pushing for market readiness amongst operators and engaging Indigenous communities at the grassroots level
3. Partnerships – ensuring ITBC has a strong presence and bringing partners together through industry events

**Manitoba**
1. Training
2. Capacity building
3. Access to capital

**Nova Scotia**
1. Growing capacity of Indigenous communities and businesses as it relates to the tourism sector
2. Growing the Indigenous tourism sector, through cultural revitalization and authenticity
3. Developing a model that encompasses different sectors including Indigenous leadership, partners, government and the corporate sector

**Newfoundland & Labrador**
1. Product Development – experience and skills development workshops
2. Authenticity – particularly around arts, crafts and storytelling
3. Market Readiness

**North (Nunavut & NWT)**
1. Resource support (finance and training)
2. Research to ensure investments are strategically spent
3. Business development to provide skills to entrepreneurs

**Yukon**
1. Completing their organizational strategy in order to start chasing goals and targets
2. Commencing a series of visits to the Indigenous communities to spread awareness and determine how to best support Indigenous tourism operators, entrepreneurs and cultural carriers
3. Enhancing marketing capacities – promoting its Indigenous businesses and members
1.3 Indigenous Tourism Economic Impact – National Perspective

Below is a summary of Canadian Indigenous tourism associations or their province/territory’s representative organizations. Annual funding, investment and contribution were compared. Note that provincial Indigenous tourism contribution to employment is referenced in full-year (FY) jobs.

**Western Provinces**

<table>
<thead>
<tr>
<th>Western Provinces</th>
<th>BC ITBC</th>
<th>AB ITAA</th>
<th>SK ITAC</th>
<th>MB ITAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
<td>$2,151,500</td>
<td>$291,000</td>
<td>$65,000</td>
<td>$65,000</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to GDP**</td>
<td>$260,274,700</td>
<td>$166,240,153</td>
<td>$116,711,232</td>
<td>$41,729,315</td>
</tr>
<tr>
<td>Funding as a Percentage of Provincial GDP*</td>
<td>0.83%</td>
<td>0.18%</td>
<td>0.06%</td>
<td>0.16%</td>
</tr>
<tr>
<td>Number of Employees*</td>
<td>9</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to Employment**</td>
<td>5,137</td>
<td>2,395</td>
<td>2,984</td>
<td>1,002</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$524,159,395</td>
<td>$387,713,993</td>
<td>$252,886,369</td>
<td>$94,133,678</td>
</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services

**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts

<table>
<thead>
<tr>
<th>Annual Government Core Funding for Organizational Operations</th>
<th>Provincial Indigenous Tourism Contribution to GDP (millions)</th>
<th>Provincial Indigenous Tourism Contribution to Employment</th>
</tr>
</thead>
</table>

Canadian Ecotourism Services (CES)© 2019 Report
Eastern Provinces

<table>
<thead>
<tr>
<th>Name of Representing Organization</th>
<th>ON ITO</th>
<th>QC QAT</th>
<th>QC COTA/EIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
<td>$165,000</td>
<td>$1,300,000</td>
<td>$2,526,400</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to GDP</td>
<td>$622,079,198</td>
<td>$156,014,216</td>
<td></td>
</tr>
<tr>
<td>Funding as a Percentage of Provincial GDP</td>
<td>0.03%</td>
<td>0.83%</td>
<td>1.62%</td>
</tr>
<tr>
<td>Number of Employees</td>
<td>2</td>
<td>5</td>
<td>14</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to Employment</td>
<td>10,750</td>
<td>3,178</td>
<td></td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$1,368,281,933</td>
<td>$297,621,179</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services

**Source: The Conferene Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts

<table>
<thead>
<tr>
<th>Annual Government Core Funding for Organizational Operations</th>
<th>Provincial Indigenous Tourism Contribution to GDP (millions)</th>
<th>Provincial Indigenous Tourism Contribution to Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Canadian Ecotourism Services (CES)© 2019 Report
Atlantic Provinces

<table>
<thead>
<tr>
<th></th>
<th>NB</th>
<th>NS</th>
<th>PEI</th>
<th>NL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Representing Organization</td>
<td>Met Park/ITAC</td>
<td>NSITEN</td>
<td>Lennox Island FN</td>
<td>Qalipu FN</td>
</tr>
<tr>
<td>Annual Government Core Funding for Organizational Operations*</td>
<td>$65,000</td>
<td>$65,000</td>
<td>$55,500</td>
<td>$500,000</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to GDP</td>
<td>$24,345,633</td>
<td>$31,581,733</td>
<td>$4,204,901</td>
<td>$47,586,486</td>
</tr>
<tr>
<td>Funding as a Percentage of Provincial GDP</td>
<td>0.27%</td>
<td>0.21%</td>
<td>1.32%</td>
<td>1.05%</td>
</tr>
<tr>
<td>Number of Employees</td>
<td>1</td>
<td>0.5</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Contribution to Employment</td>
<td>692</td>
<td>795</td>
<td>146</td>
<td>783</td>
</tr>
<tr>
<td>Provincial Indigenous Tourism Output**</td>
<td>$71,333,669</td>
<td>$51,403,986</td>
<td>$7,187,176</td>
<td>$95,243,659</td>
</tr>
</tbody>
</table>

*Source: Canadian Ecotourism Services
**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts

Annual Government Core Funding for Organizational Operations

Provincial Indigenous Tourism Contribution to GDP (millions)

Provincial Indigenous Tourism Contribution to Employment
Northern Territories

<table>
<thead>
<tr>
<th>Northern Province</th>
<th>NT</th>
<th>YT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Representing Organization</td>
<td>ITAC</td>
<td>YFNCT</td>
</tr>
</tbody>
</table>

- **Annual Government Core Funding for Organizational Operations**: $257,000 / $560,000
- **Provincial Indigenous Tourism Contribution to GDP**: $102,891,195 / $35,165,217
- **Funding as a Percentage of Provincial GDP**: 0.25% / 1.59%
- **Number of Employees**: 1 / 4
- **Provincial Indigenous Tourism Contribution to Employment**: 1,358 / 758

**Provincial Indigenous Tourism Output**: $262,143,675 / $83,539,135

*Source: Canadian Ecotourism Services

**Source: The Conference Board of Canada / ITAC - Canada’s Indigenous Tourism Sector: Insights and Economic Impacts**
1.4 Building a Case for Ontario

Annual Government Funding for Organizational Operations

As displayed above, Ontario is disproportionally underfunded compared to the amount that Indigenous tourism contributes to GDP. It is recommended that at least 1% of the provincial GDP industry contribution is invested in Indigenous tourism to support the industry; this would be $6.2M for Ontario.

ITO currently only has 2 employees, significantly less than other best practice Indigenous tourism organizations in Canada, limiting its capacity to service the growing number of businesses and industry demand.

Upon a review of other provincial jurisdictions, it is recommended that core funding for Indigenous tourism be at least 1% of that province’s industry contribution to the GDP.

ITO currently only has 2 employees, significantly less than other best practice Indigenous tourism organizations in Canada, limiting its capacity to service the growing number of businesses and industry demand.
ITBC has consistently been supported with core funding to accomplish their objectives. Destination BC supports Indigenous tourism by funding ITBC ($1M in 2017-18), which is the amount that a regional DMO in BC receives annually. Although ITBC receives a total of $2.15M in operational funding, as of 2018, ITBC believes that it is underfunded by $500,000 - $1,000,000.

By comparison, ITO managed to deploy elements of establishing a provincial Indigenous tourism organization without the necessary financial and human capacity required – certainly as compared to BC. However, ITO has made headway with some initiatives that were financially supported by the Ontario Minister of Tourism Culture & Sport. ITO continued to move the agenda forward, and as of January 2018, ITO officially began operations establishing the organization as a not-for-profit corporation operating out of a dedicated office space.

**Ontario’s 13 Regional Tourism Organizations (RTO) receive a total of $37,998,386 annually. ITO received $165,000 in 2016/17.** So far there has been no full political and financial support assigned by Ontario organizations to support the growth of Indigenous tourism in the province, even though it contributes greatly to the provincial tourism economy. It is recommended that a funding model for Indigenous tourism similar to that of BC is adopted by Ontario.

ITO continues to have a strong partnership with the Indigenous Tourism Association of Canada (ITAC). During 2017/2018, ITAC provided $65,000 as the only Federal funder for ITO’s operational aspirations; however, ITO recognizes ITAC’s limitations in funding ITO further. ITAC’s budget of $3,914,481 must support its core operations as well as multiple Indigenous organizations and associations across the country.
Trying to Meet the Basic Needs of the Industry

ITO critically lacks the investment and capacity to service the province’s growing number of Indigenous tourism providers and experiences that could be market and export ready for tourists. If properly funded, ITO would have the ability to assist 614 identified Indigenous-owned tourism businesses with the support and skills required for developing their products and marketing them effectively. In addition, there are 300+ ‘indigenous experiences’ and micro-businesses in Ontario that require the support to become market-ready.

ITO does not have the organizational capacity to implement the key initiatives needed to sustain the industry and growing demand for Indigenous tourism products and experiences. ITO currently cannot provide support for Indigenous businesses to become market and export ready; does not have a cooperative financial/governance model established; cannot provide capacity building and training programs; does not have a fully staffed organization; and does not have an allocated marketing budget. Ontario is one of the only regions unable to support the growth of its Indigenous tourism industry.

Provincial Capacities to Support Indigenous Tourism

<table>
<thead>
<tr>
<th></th>
<th>BC</th>
<th>YT</th>
<th>North</th>
<th>AB</th>
<th>Prairies</th>
<th>ON</th>
<th>QC</th>
<th>Atlantic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provincial Support for an Indigenous Tourism Strategy</td>
<td>☐</td>
<td>→</td>
<td>☐</td>
<td>☐</td>
<td>→</td>
<td>→</td>
<td>☐</td>
<td>→</td>
</tr>
<tr>
<td>Developing &amp; Assisting Market-Ready Businesses</td>
<td>☐</td>
<td>☐</td>
<td>→</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Cooperative Financial/Governance Model Established</td>
<td>☐</td>
<td>☐</td>
<td>→</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Initiatives for Product Development</td>
<td>☐</td>
<td>→</td>
<td>→</td>
<td>☐</td>
<td>→</td>
<td>→</td>
<td>☐</td>
<td>→</td>
</tr>
<tr>
<td>Capacity Building Programs in Place</td>
<td>☐</td>
<td>☐</td>
<td>→</td>
<td>→</td>
<td>→</td>
<td>→</td>
<td>☐</td>
<td>→</td>
</tr>
<tr>
<td>Organizational Staffing Requirements Fulfilled</td>
<td>☐</td>
<td>→</td>
<td>☐</td>
<td>→</td>
<td>→</td>
<td>→</td>
<td>☐</td>
<td>→</td>
</tr>
<tr>
<td>Allocated Marketing Budget for Indigenous Tourism Experiences</td>
<td>☐</td>
<td>→</td>
<td>☐</td>
<td>→</td>
<td>→</td>
<td>→</td>
<td>☐</td>
<td>→</td>
</tr>
</tbody>
</table>

LEGEND
☐ Satisfies Criteria
→ In Progress
☑ Not in Progress

Source: Canadian Ecotourism Services

Ontario Industry Perspective – Quick Facts

In 2018, ITO conducted a province-wide survey of Indigenous tourism businesses, Indigenous communities and Tourism Partners. The data below provides an overview of preliminary findings of the survey; over 130 individuals responded.

- 43% of Indigenous tourism business respondents identified as self-employed
- 61% of Indigenous tourism business respondents operate on-reserve
- 61% of Indigenous tourism business respondents stated that their business is growing (experienced an increase in sales performance from 2017)
- 82% of Indigenous tourism business respondents stated that the support that they require the most is funding or financing support; 69% stated they require marketing support
- 77% of Indigenous community respondents stated that tourism development in their community would be beneficial
- 84% of Indigenous community respondents stated that their greatest tourism asset is the natural environment (the land)
- 87% of Indigenous community respondents stated that the support that they require the most is funding or financing support
- 94% of Indigenous community respondents stated that cultural learning experiences would be the tourism product best suited to their community
Satisfying a Growing Demand

As recently reported by ITAC, Indigenous tourism in Canada is growing at an exceptional rate. Only 3 years into its 5-year plan, ITAC has already exceeded its targets for Indigenous tourism growth in Canada. The industry has seen an increase of $400 M, bringing the total Indigenous tourism revenues in annual Canadian GDP to $1.8 B. Employment in Indigenous tourism has also surpassed its 2021 goal, bringing the total jobs in Indigenous tourism in Canada to 41,153.\textsuperscript{15v}

United States Market Snapshot:

Ontario’s tourism market potential for Indigenous experiences is huge. According to a recent study by Destination Canada and ITAC, Ontario’s Indigenous tourism products are in demand by Canada’s largest target market, the United States, which could bring over 17 million visitors seeking an Indigenous tourism experience over the next 2 years.\textsuperscript{15vi}

Investing in ITO’s Future

Based on the recommendations presented in its 2020 Strategic Plan, ITO is currently behind its funding targets by $3,839,986.

In 2015, an investment of $6.8 M into ITO was recommended over 5 years. This is just over 1% of the anticipated growth in Indigenous tourism output over the same amount of time, which was projected at $629 M. Furthermore, it is estimated that Indigenous tourism will generate over $12B in total output and $6.7B in GDP to Ontario’s economy by 2020.

As mentioned above, provincial government funding to support Indigenous tourism should be at least 1% of the industry’s contribution to the GDP.
4.0 Presentation of Findings

The following sections provide a snapshot of Ontario’s Indigenous tourism landscape as reported by stakeholders of the industry and individuals of Indigenous communities across the province. The data was collected by means of an online/hard copy survey as well as focus groups conducted at the 6 regional workshops across Ontario. For the full consultation report, including stakeholder responses, see Appendix B & C.

From August 28, 2018 to December 10, 2018, a total of 127 respondents participated in the survey. Three different surveys were developed targeting the following groups:

- Indigenous Tourism Businesses
- Indigenous Community Members
- Tourism Partners

The survey was distributed to participants during the regional workshop series and was also available online. A province-wide digital awareness campaign was launched to encourage participation in the survey and attendance at the regional workshops.

The surveys were used by researchers to establish a baseline to establish common themes and sentiments using both qualitative and quantitative data. The reader is cautioned that findings presented are not necessarily representative of all Indigenous tourism businesses in Ontario.

Data collected from participants during the regional workshop series was done using a focus group format as well as roundtable sharing exercises. For more information about primary research methodology, see section 1.2.

4.1 Indigenous Tourism Business Survey Results

Of all who participated in the survey, 21% of respondents self-reported as an ‘Indigenous tourism business’ - a total of 26 individuals. All questions were designed to gain a better understanding of the characteristics of Indigenous tourism businesses in Ontario and to determine the most pressing needs in order to properly support the industry.

Note that for each question, survey respondents were given the option of choosing 1 or more characteristics that define their business. For this reason, percentages do not add up to 100%.

**Business Operational Characteristics**

When asked about their business’ organizational structure, 43% of respondents reported that they are self-employed. Approximately a quarter (26%) stated that their Indigenous tourism business was community driven, and corporations also made up 26% of businesses. Partnerships and not-for-profits each made up 9% of businesses.
Indigenous Tourism Businesses Organizational

- Self employed: 32%
- Partnership: 7%
- Corporation: 19%
- Not for Profit – Social Enterprise: 7%
- Community Driven: 19%
- Other: 10%

Source: Canadian Ecotourism Services

Structure

In terms of the size of businesses, the majority of respondents (57%) declared that their business employs between 1 and 4 people during the regular season; this includes owners and management. In contrast, a third of respondents declared that their business employed over 20 people.

When asked about the primary operating location of their business, 61% of respondents declared that they operate on reserve. 43% declared that they operate in a rural or small community, and 30% stated that they operate within traditional territory. 26% operate off reserve while 22% operate within a remote location. Only 17% operate in an urban centre or city.

Products & Services

Indigenous tourism businesses were asked to identify the primary goods or services that their business provides. Rarely businesses were involved in 1 sole activity, with the majority of respondents identifying more than 1 main product or service. The results are as follows:

The percentage of businesses providing accommodations for tourists is 48%. Guided cultural tours, workshops or experiences are offered again by 48% of businesses. A guided outdoor activity or experience is also a primary product offered by 48% of businesses.

Indigenous Tourism Businesses Primary Goods or Services

Hosting cultural events or performances and Indigenous arts, crafts and/or souvenirs were also popular product and service offerings by Indigenous tourism businesses.

The smallest number of respondents declared that their business offers sports, gaming or entertainment (13%).

Relating to Indigenous cultural experiences, some additional comments offered by respondents regarding their business’ core offering included: observer (cultural hunting and gathering), ATV tours and cultural programming, Indigenous cultural sensitivity training, and harvesting wild rice.

Source: Canadian Ecotourism Services
Sales Performance & Growth Prospects

When asked about their business’ sales performance in 2017, the majority (61%) of respondents declared that their business grew, and they experienced an increase in visitors from the previous year. 30% declared that their business was sustainable and their quantity of visitors stayed about the same. 9% of respondents declared that their business was not sustainable and that they may not be operating in future years.

Indigenous Tourism Businesses Sales Performance

![Sales Performance Diagram]

Source: Canadian Ecotourism Services

When asked to comment about how they expect their business to grow, the most common responses were an increase in employees (70%) and an expansion of their product offering (70%). Additional expected areas of growth include an increase in marketing activities and/or reaching new markets (65%) and an increase in customers (65%).

Market Characteristics

When asked about where the majority of their visitors come from, the highest number of indigenous tourism businesses reported provincial visitors (from within Ontario) and regional visitors (from within 200 kilometres of the business) made up the majority of their clientele. International visitors also constituted a significant number of visitors. National visitors and local visitors (from within 25 kilometres of the business) constituted the least number of visitors at Indigenous tourism businesses.

Key Challenges & Support Required

Identifying the main challenges and barriers to Indigenous tourism development in Ontario is 1 of the primary goals of this research study. Individuals were asked what some of the ongoing challenges are that they face as Indigenous tourism business owners.

Identified as the main challenge facing Indigenous tourism businesses, funding and financial support remains a pressing concern facing the industry today and historically. Seed funding, raising capital, start-up and having the funds to broadly market products are some of the main financial challenges facing Indigenous tourism business respondents.

The remote location of many Indigenous communities is also a principle challenge facing tourism businesses development in Ontario. Transportation to isolated communities makes drawing tourists difficult. The high costs associated with living in a remote community also present very real challenges for all aspects of business development.

Additional challenges as identified by Indigenous tourism businesses are:

- Staffing or finding dedicated employees
- Reaching key markets and generating awareness
- Environmental factors such as weather
- Lack of tourism and business planning support
- Lack of resources to support Indigenous tourism
- Destination identity and community knowledge regarding tourism

In order to address the above challenges, Indigenous tourism businesses were asked to share what kind of support they require most. 83% of respondents indicated that funding and financial support was most needed. Marketing support (target market identification, online strategy, marketing activities, etc.) was identified by 70% of businesses. Support in establishing strategic partnerships and business planning were both indicated by 43% of respondents.
Support Required by Indigenous Tourism Businesses

Source: Canadian Ecotourism Services

Opportunities for Indigenous Tourism as Identified by Businesses

When asked about the main opportunities that the industry holds, Indigenous tourism businesses provided a wide variety of answers. The most common response was using tourism to balance core Indigenous beliefs with economic development. This includes bringing back traditional skills, crafts and ways of life.

Additional opportunities as identified by Indigenous tourism businesses are:

- Cultural tours including ecotourism and adventure
- Reconciliation and cross-cultural understanding
- Targeting international markets
- Size of the market in Ontario
- Increasing interest in authentic Indigenous experiences
- Product development and making these experiences available
- A central marketing portal for Indigenous tourism
- Self-employment
- Inter-tribal networking and partnerships
<table>
<thead>
<tr>
<th>Indigenous Tourism Businesses in Ontario Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Operational Characteristics</strong></td>
</tr>
<tr>
<td>The most common operating characteristics of Indigenous tourism businesses in Ontario are:</td>
</tr>
<tr>
<td>- Self-employed or community-based enterprises</td>
</tr>
<tr>
<td>- Between 1 and 4 employees</td>
</tr>
<tr>
<td>- Operate on reserve and/or in small/rural communities</td>
</tr>
<tr>
<td><strong>Products &amp; Services</strong></td>
</tr>
<tr>
<td>The most common product and/or service offered by Indigenous tourism businesses in Ontario are:</td>
</tr>
<tr>
<td>1. Accommodations</td>
</tr>
<tr>
<td>2. Guided cultural tours, workshops or experiences</td>
</tr>
<tr>
<td>3. Guided outdoor activity or experience</td>
</tr>
<tr>
<td><strong>Sales Performance &amp; Growth Prospects</strong></td>
</tr>
<tr>
<td>61% of Indigenous tourism businesses experienced an increase in sales in 2017. Future expected areas of growth for Indigenous tourism businesses are:</td>
</tr>
<tr>
<td>- Increase in employees</td>
</tr>
<tr>
<td>- Expansion of product offering</td>
</tr>
<tr>
<td>- Increase in marketing activities and/or reaching new markets</td>
</tr>
<tr>
<td><strong>Market Characteristics</strong></td>
</tr>
<tr>
<td>Geographic segmentation of the primary markets for Indigenous tourism businesses are:</td>
</tr>
<tr>
<td>- Provincial visitors (from within Ontario)</td>
</tr>
<tr>
<td>- Regional visitors (from within 200 kilometres of the business)</td>
</tr>
<tr>
<td>- International visitors</td>
</tr>
<tr>
<td><strong>Key Challenges &amp; Support Required</strong></td>
</tr>
<tr>
<td>The primary challenges facing Indigenous tourism businesses are:</td>
</tr>
<tr>
<td>- Access to funding and lack of financial support</td>
</tr>
<tr>
<td>- Remote or isolated locations</td>
</tr>
<tr>
<td>Indigenous tourism businesses require support in the form of:</td>
</tr>
<tr>
<td>- Funding</td>
</tr>
<tr>
<td>- Marketing support</td>
</tr>
<tr>
<td>- Establishing strategic partnerships</td>
</tr>
<tr>
<td>- Business planning</td>
</tr>
<tr>
<td><strong>Opportunities for Indigenous Tourism as Identified by Businesses</strong></td>
</tr>
<tr>
<td>The greatest opportunity for Indigenous tourism development as identified by businesses lies in the ability to preserve, revitalize and strengthen Indigenous culture while promoting sustainable economic development.</td>
</tr>
</tbody>
</table>
4.2 Indigenous Communities Survey Results

Of all who participated in the survey, 26% of respondents self-reported as an ‘Indigenous community member’ - a total of 33 individuals. The community member survey was designed to gain a better understanding of the situation facing Indigenous communities with respect to developing tourism. The information below details current and past experience with tourism, and challenges and opportunities for the future. For many Indigenous communities in Ontario, tourism has been identified as a key initiative for economic development that respects cultural values and preserves surrounding ecosystems.

Representation from the following communities was obtained:
- Wahnapitae First Nation
- Temagami First Nation
- Shawanaga First Nation
- Atikameksheng Anishnawbek
- Delaware Nation
- Garden River First Nation
- Wahgoshig First Nation
- Mohawks of the Bay of Quinte
- Saugeen First Nation #29
- Chippewas of Nawash Unceded First Nation
- French River #13
- New Slate Falls Band
- Eagle Lake First Nation
- M’Chigeeng First Nation
- Six Nations of the Grand River
- Walpole First Nation

Level of Community Support for Indigenous Tourism

Based on survey results, it appears that there is overwhelming support for tourism development in Indigenous communities. When asked if they felt that tourism development in their community would be beneficial, 77% of respondents declared that yes, it would be beneficial. 23% of respondents said ‘maybe’ and 0% said ‘no’.

![Would Indigenous Tourism Development in Your Community be Beneficial?](image)

Source: Canadian Ecotourism Services

When asked about their community’s desire or openness to develop Indigenous tourism, the following results were obtained: 29% possessed a ‘strong desire and commitment to develop and invest in community-based Indigenous tourism’. 26% declared a ‘willingness to develop and invest in community-based Indigenous tourism’ while 35% held an ‘interest developing community-based Indigenous tourism’. Only 3% had ‘no interest in developing community-based Indigenous tourism’.
Indigenous communities’ desire/openness to develop Indigenous tourism

<table>
<thead>
<tr>
<th>Interest in developing</th>
<th>35.48%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong desire</td>
<td>29.03%</td>
</tr>
<tr>
<td>Willingness to develop</td>
<td>25.81%</td>
</tr>
<tr>
<td>Would consider</td>
<td>6.45%</td>
</tr>
<tr>
<td>No interest</td>
<td>3.23%</td>
</tr>
</tbody>
</table>

Source: Canadian Ecotourism Services

Indigenous community members place great importance on key socio-economic factors affecting their communities when it comes to tourism development. On a scale of 1 to 5 (1 being less important and 5 being very important), survey participants were asked to rate the importance of several socio-economic factors for developing their community’s local tourism industry. The most important aspect according to respondents is ‘respecting cultural values and traditions’. ‘Preservation of and respect for the land’ was also of great importance for community members. The inclusion of Elders and youth in community tourism development also remained of high importance.

Importance of Socio-Economic Factors According to Indigenous Communities

Source: Canadian Ecotourism Services

Canadian Ecotourism Services (CES) © 2019 Report
Community Tourism Assets

Indigenous community members who responded to the survey outlined many of the tourism assets that exist in their communities. Participants were asked to describe their community’s past and current tourism assets or initiatives, including infrastructure, tours, products, trained workforce, website and marketing initiatives. Respondents also shared potential assets such as untouched wilderness that can be utilized for Indigenous tourism.

The most common response provided by community members was educational cultural tours or teachings including workshops. Other popular tourism assets include: nature trails and waterways, a trained workforce including tour guides, accommodations /campgrounds and cultural interpretive centres or historical attractions.

Below are additional community tourism assets as described by survey respondents:
- Food and beverage services
- Fishing/hunting lodges and guides
- Community businesses
- Community website
- Arts and craft/gift shops
- Pow wows and other events
- Knowledge keepers
- Pristine wilderness
- Tourism planning initiatives
- Convenience/gas stores
- Partnerships (educational institutions and tourism associations)
- Cottage lots
- Small aircraft
- Bus tours
- Employment and training programs

Based on survey responses, it has been identified that Indigenous communities possess tourism assets that strongly align with sustainable ecotourism, of which Indigenous tourism is a subset. When asked what their community’s greatest asset is that can be offered to visitors, 84% of respondents declared that the natural environment or the land. 74% of respondents stated that traditional skills, including hunting, fishing, gathering, food preparation, crafts or tool making are their community’s greatest asset.

Many community members also stated that community sites such as historical/cultural centres were their community’s greatest asset - a total of 65% of respondents.

![Indigenous Communities' Greatest Tourism Asset](chart)

**Indigenous Communities' Greatest Tourism Asset**

- Natural environment: 83.87%
- Traditional skills: 25.81%
- Community sites: 32.26%
- Storytelling: 64.52%
- Local attractions: 61.39%
- Eat at a local restaurant: 74.19%
- Other: 83.87%

**Cultural Products & Protocol**

The tourism products and services best suited for Indigenous communities or destinations are intricately linked to authentic cultural experiences. Survey participants were asked to identify the tourism products that they feel are best suited for their community. 94% of respondents stated that ‘cultural learning experiences or workshops’ were best suited for their community. Outdoor or nature-based experiences and cultural events or performances were both indicated by 84% of survey respondents.
As cultural integrity and authenticity are crucial for Indigenous tourism development, survey participants were asked to comment on which aspects of their culture they would be willing to share with tourists and which aspects they would not be willing to share with tourists.

When asked to explain which aspects of Indigenous culture they’d be happy to share with visitors to their community, the most common response offered was cultural/community history. Other common responses include: the land, language, way of life, traditional beliefs, community/historical sites and residential school awareness.

Below is a list of additional cultural aspects that community members WOULD like to share with a visitor to their community:
- Spiritual items
- Language
- Land
- Bimaadizwin (roughly interpreted as the good way of living)
- Traditional harvest and hunting areas
- Burial grounds
- Sacred teachings/knowledge
- Some social challenges facing the community
- Hiking trails
- Traditional foods
- Local artisans
- Ceremonies
- Event planning
- Skills and knowledge of community youth
- Sweat lodge teachings
- 7 Grandfather Teachings
- Medicines
- Drumming
- Moose hunt
- Smudging

When asked to comment on the aspects of their Indigenous culture that they would not like to share with visitors, responses varied widely. It seems that each Indigenous community in Ontario is different with respect to openness in sharing certain aspects of their culture.

The most common response indicated by community members was that they are completely open to sharing their Indigenous culture, as long as visitors are respectful. Some recurring responses indicated that community members do not want to share their ceremonies nor the location of traditional medicines with visitors.

Below is a list of additional cultural aspects that community members WOULD NOT like to share with a visitor to their community:
- Historical sites and residential school
- Sacred teachings/knowledge
- Burial grounds
- Sacred objects

Key Challenges & Support Required
Addressing the challenges associated with tourism development in Indigenous communities is perhaps the most important activity that a provincial Indigenous tourism organization can undertake. Identifying the challenges faced by communities who want to develop tourism will help the industry to grow sustainably.

Indigenous community members who responded to the survey openly shared the challenges that they face in developing tourism. Again, the responses were varied, indicating that each community is faced with its own set of challenges. However, each individual response offers important insight for addressing limitations on a provincial scale.
As a general statement and based on survey responses, the lack of resources (of various sorts) is what impedes Indigenous tourism development in communities across Ontario. The most common challenge indicated by community members was the lack of financial resources and funding. Another common challenge indicated by respondents was the location and remoteness of their communities. Lack of personnel and capacity amongst leadership and staff as well as a unified strategy for tourism development were also identified as a recurring challenge. Lastly, lack of community support, market awareness and misunderstanding between community members and non-Indigenous visitors were indicated as key challenges for some communities.

Additional challenges faced by communities with respect to developing tourism are:

- Lack of accommodations
- Lack of visitors to Indigenous communities
- Community members fear misuse of Indigenous culture
- Lack of band-owned land
- Community members not willing to welcome non-Indigenous visitors
- Communication skills/shyness
- Visitors who do not understand English

The majority of Indigenous community members who responded to the survey indicated that funding and financial support was most needed to support tourism development (87%). Training and human resource development along with marketing support are also key areas to be addressed.

**Support Required for Communities to Develop Indigenous**

<table>
<thead>
<tr>
<th>Support Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding and financing support</td>
<td>87.10%</td>
</tr>
<tr>
<td>Marketing support</td>
<td>64.52%</td>
</tr>
<tr>
<td>Establishing essential tourism infrastructure and services</td>
<td>64.52%</td>
</tr>
<tr>
<td>Training and human resource development</td>
<td>64.52%</td>
</tr>
<tr>
<td>Product development and refinement</td>
<td>58.06%</td>
</tr>
<tr>
<td>Community and strategic planning</td>
<td>58.06%</td>
</tr>
<tr>
<td>Other</td>
<td>6.45%</td>
</tr>
</tbody>
</table>

Tourism

Source: Canadian Ecotourism Services
## Tourism in Indigenous Communities Summary

| Level of Community Support for Indigenous Tourism | 77% of community member survey respondents feel that Indigenous tourism would be beneficial for their communities and 91% have at least an interest in developing Indigenous tourism in their community. For community members, the most important socio-economic factors when developing tourism are:  
- Respecting cultural values and traditions  
- Preservation of and respect for the land  
- Inclusion of youth and Elders |
| --- | --- |
| Community Tourism Assets | The most common tourism asset within Indigenous communities is educational cultural tours or teachings including workshops. Other common Indigenous tourism assets include:  
- Nature trails and waterways  
- Trained workforce including tour guides  
- Accommodations/campgrounds  
- Cultural interpretive centres or historical attractions  
84% of community member survey respondents declared that the natural environment or the land is their community’s greatest tourism asset. |
| Cultural Products & Protocol | Tourism products best suited for Indigenous communities, as identified by survey respondents are:  
- Cultural learning experiences or workshops  
- Outdoor or nature-based experiences  
- Cultural events or performances  
The most common cultural aspects that Indigenous community members would be willing to share with tourists are: cultural history, the land, language, way of life, traditional beliefs, community/historical sites and residential school awareness. Common aspects that community members would NOT be willing to share are ceremonies and location of traditional medicines. |
| Key Challenges & Support Required | The most common challenges for Indigenous communities in developing tourism include:  
- Funding and financial resources  
- Location and remoteness of communities  
- Lack of personnel and capacity amongst leadership and staff  
Key areas for support include:  
- Funding and financial support  
- Training and human resource development  
- Marketing support |
4.3 Tourism Partners Survey Results

Of all who participated in the survey, 57% of respondents self-reported as a ‘tourism partner’ - a total of 72 individuals, which was the largest group of respondents. Questions for tourism partners were designed to gauge support from potential provincial partners and identify opportunities for collaborations aimed at growing the entire provincial tourism economy.

As a general statement, the majority of partners who responded to the survey indicated a need to connect Indigenous communities, experiences and cultural providers with these partner organizations. There is a huge desire and interest for tourists to learn about and experience Indigenous culture. Tourism partners are keen to expand Indigenous programming and increase authentic, respectful and relevant Indigenous content within their organizations.

Support for Indigenous Tourism in Ontario

Tourism partners in Ontario strongly support the development and promotion of Indigenous tourism in Ontario. 79% of survey respondents indicated that they support Indigenous tourism in the province.

Partner Support for Indigenous Tourism in Ontario*

*Source Canadian Ecotourism Services

Similarly, the majority (95%) of tourism partners stated that they would be interested in partnering with ITO on joint initiatives. The most common partnership opportunity suggested by partners was collaboration in hosting workshops or training.

Other partnership opportunities suggested were:
- Research and education (sharing information)
- Connecting with Indigenous stakeholder groups
- Blog/social media writing
- Developing products and product partnerships
- Showcasing Indigenous culture in their organization

Tourism partner survey participants were asked what kind of support their organization would be willing to contribute to ITO and the development of Indigenous tourism in Ontario. The results are displayed below.

Type of Support Partners are Willing to Contribute

Growing Indigenous Tourism Together

ITO is invested in developing meaningful and reciprocal partnerships that will grow the provincial tourism industry as a whole. Tourism partners were asked how they see ITO contributing to their own organizations. A wide variety of responses were received, however among the most common included:
- Partnerships, networking and knowledge sharing
- Education and cultural exchange
- Capacity building and support tools for communities and operators
- Promoting authentic Indigenous experiences available in a specific region

Source: Canadian Ecotourism Services

Canadian Ecotourism Services (CES) © 2019 Report
Additional ways in which ITO can contribute to its partner organizations include:

- Developing Indigenous tourism products in a respectful way
- Assisting with engaging with Indigenous tourism providers and communities in a specific region
- Creating and growing jobs and businesses
- Identifying Indigenous tourism best practices or communities committed to developing tourism
- Providing Indigenous tourism promotional material for visitors
- Supporting regional economic development
- Building trust in Indigenous communities
- Hosting events

Some additional responses included:

- Indigenous tourism training for communities
- Inventory of available market-ready Indigenous tourism products & experiences
- Indigenous tourism best practices and success stories
- Community priorities and evidence of community buy-in
- Research results and resources
- Improving service standards
- Knowledge and learning opportunities about Indigenous cultures (connecting in a respectful and responsible way)
- Strong organizational capacity
- Financial support
- Representation of the Indigenous-owned tourism offerings and experiences in Ontario

Opportunities for Indigenous Tourism

As with all survey participants, ITO asked tourism partners what some of the main opportunities are that they see for growing Indigenous tourism in Ontario. Sharing Indigenous culture and knowledge through awareness and education was identified as the greatest opportunity for this industry. Product and experience development were also cited as a great opportunity as there is an increased market interest in Indigenous tourism across the globe; therefore, marketing and promotion will help to build awareness.

Additional common responses included:

- Sound environmental experiences, untapped wilderness and adventure tourism
- Authentic experiential tourism
- Developing and leveraging partnerships
- Skills, training and workforce development
- Economic growth in Indigenous communities and building Indigenous businesses
- Truth and reconciliation
- Indigenous experience guides in larger cities
- Family travel experiences
- Indigenous tourism circuits/routes
- Making visitors feel welcome

When asked what their organization needs from ITO in order to grow the industry, tourism partners responded candidly. Many respondents indicated that they required more communication about ITO’s work, information about partnerships and opportunities for networking. In addition, many tourism partners stated that they require greater connectivity with Indigenous cultural providers in order to support them.
### Partners of Indigenous Tourism Summary

| Support for Indigenous Tourism in Ontario | 79% of tourism partner survey respondents currently support the development of Indigenous tourism in Ontario. 95% of tourism partners stated that they would be interested in partnering with ITO on joint initiatives. The most common partnership opportunity suggested by partners was collaboration in hosting workshops or training. |
| Growing Indigenous Tourism Together | The most common areas for collaboration between ITO and potential tourism partners included: |
| | ▪ Partnerships, networking and knowledge sharing |
| | ▪ Education and cultural exchange |
| | ▪ Capacity building and support tools for communities and operators |
| | ▪ Promoting authentic Indigenous experiences available in a specific region |
| In order to grow the Indigenous tourism Industry together, tourism partners require the following from ITO: |
| | ▪ More communication about ITO’s work, information about partnerships and opportunities for networking |
| | ▪ Greater connectivity with Indigenous cultural providers in order to support them |
| Opportunities for Indigenous Tourism | According to tourism partners in Ontario, some of the greatest opportunities for growing Indigenous tourism include the following: |
| | ▪ Sharing Indigenous culture and knowledge through awareness and education |
| | ▪ Product and experience development |
| | ▪ Increased interest in Indigenous tourism from the visitor perspective – taking advantage by means of marketing and promotion to create awareness |
4.4 Indigenous Tourism Workshop Results

Below is a summary of the comments received during the ITO Regional Workshops from participants during a focus group activity. Participants were asked to answer 4 questions related to supporting the growth of Indigenous tourism in Ontario. The comments were grouped into common themes based on facilitated dialogue and qualitative responses. The responses are captured by individual cities with a 200km geographic reach to capture local realities and priorities. *Charts & tables Source: Canadian Ecotourism Service.*

**Toronto**

What do we need at a community level to grow Indigenous Tourism in Ontario?

<table>
<thead>
<tr>
<th>What do we need at a community level to grow Indigenous Tourism in Ontario?</th>
<th>Product Development</th>
<th>Marketing &amp; Promotion</th>
<th>Capacity Building</th>
<th>Community Support &amp; Awareness</th>
<th>Partnerships &amp; Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion and marketing</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training standards about service quality</td>
<td></td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Community support and involvement | | | | | ✔
| Funding, financial partnerships and sponsorships | ✔ | | | | |
| Festivals and events | | | | | ✔
| Sharing success and opportunities with one another | | | | | ✔
| Good mind | | | | | ✔
| Tourism as an economic driver | | | | | ✔
| Workshops, seminars and conferences | | | | | ✔
| More social presence | | | | | ✔
| Entrepreneurs | | | | | ✔
| Partnerships | | | | | ✔
| Media partners | | | | | ✔
| Corporate | | | | | ✔
| Federal, provincial and local | | | | | ✔
| Tourism boards | | | | | ✔
| International | | | | | ✔
| Tribal Councils | | | | | ✔
| Travel Conferences | | | | | ✔
| Product development | ✔ | | | | |
| Business training | | | | | ✔
| Mentoring | | | | | ✔
| Networking | | | | | ✔
| Food | | | | | ✔
| Promotions (Pow wows and cultural events) | | | | | ✔
| Websites (information available) | | | | | ✔
| Indigenous operators – providing support, product development, funding and resources | | | | | ✔
| Creating and incorporating Indigenous perspectives into tourism models | | | | | ✔
| Sharing stories | | | | | ✔
| Educating the community | | | | | ✔
| Creating opportunities to bring people together | | | | | ✔
What are the greatest challenges that you see with growing Indigenous tourism in Ontario?

![Challenge Pie Chart]

<table>
<thead>
<tr>
<th>What are the greatest challenges that you see with growing Indigenous tourism in Ontario?</th>
<th>Support &amp; Awareness</th>
<th>Governance &amp; Standards</th>
<th>Economic Assistance</th>
<th>Education</th>
<th>Social Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness – advertising and marketing</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generating interest in the tourism industry</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stereotypes and misconceptions</td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not enough training and education</td>
<td></td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation and accessibility</td>
<td></td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of technology</td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Lack of market readiness</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funding and financial support</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of community support – resistance to share the culture</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Common branding</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awareness – diversity of culture; bringing them together but respecting the differences</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources – what’s in the area to showcase? (natural resources)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Ensuring authenticity in products</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Research and development – how to structure a tourism board/body</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Conscious business/product development</td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Commodifying the impact of tourism on the earth</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintaining authenticity in development</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Politics at all levels</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What are the biggest opportunities that you see for growing Indigenous tourism in Ontario?

![Pie chart showing the distribution of responses for the biggest opportunities for growing Indigenous tourism in Ontario.]

<table>
<thead>
<tr>
<th>What are the biggest opportunities that you see for growing Indigenous tourism in Ontario?</th>
<th>Positive Market Potential</th>
<th>Tool for Reconciliation</th>
<th>Scio-economic Impacts</th>
<th>Opportunity for Cultural awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>International interests</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>People are open to learn cultural sensitivities</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Authentic true Canadian experiences</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Do what locals do – true experiences by locals</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Authenticity</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Tell the truth through experiences</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Bridge cultures and traditions</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Training tourism staff/workers in cultural sensitivities</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Change thinking and behaviours</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Reconciliation and allay ship</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Cultural tours</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Experiential workshops</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Foreign travel experiences</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Creating employment</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Economic reconciliation</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Cultural understanding</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Entrepreneurship</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Community awareness and growth</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>International cross promotion and learning (Indigenous tourism boards)</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Education and awareness</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Development of community-based tourism</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Economic growth</td>
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<tr>
<td>Employment opportunities</td>
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<tr>
<td>Pride for the community</td>
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<tr>
<td>Strengthening relationships</td>
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<tr>
<td>Recognized internationally and international visitors</td>
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<tr>
<td>Domestic (Ontario) consumers and new Canadians</td>
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<tr>
<td>Greater awareness of Indigenous products</td>
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</tbody>
</table>
Sudbury

What do we need at a community level to grow Indigenous Tourism in Ontario?

<table>
<thead>
<tr>
<th>What do we need at a community level to grow Indigenous Tourism in Ontario?</th>
<th>Product Development</th>
<th>Marketing &amp; Promotion</th>
<th>Capacity Building</th>
<th>Community Support &amp; Awareness</th>
<th>Partnerships &amp; Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training for product development</td>
<td>✔️</td>
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<tr>
<td>Entrepreneurship</td>
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<tr>
<td>Market awareness</td>
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<tr>
<td>Partnerships</td>
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<tr>
<td>Capacity building</td>
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<td>✔️</td>
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<tr>
<td>Funding</td>
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<tr>
<td>Location/land</td>
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<tr>
<td>Strategic plan / First Nations government</td>
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<tr>
<td>Business plan</td>
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<tr>
<td>Community support</td>
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<tr>
<td>Connect/internet</td>
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<tr>
<td>Humour</td>
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<tr>
<td>Stories of your area</td>
<td>✔️</td>
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<tr>
<td>Constant ongoing consultation (including Elder consultation)</td>
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<tr>
<td>Staff/HR component (attraction and retention)</td>
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<tr>
<td>Product identification</td>
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<tr>
<td>Experiential tourism opportunity identification – community driven and participatory</td>
<td>✔️</td>
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<tr>
<td>Development of visuals</td>
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<tr>
<td>Unique</td>
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<td>✔️</td>
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<tr>
<td>Community buy-in</td>
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<tr>
<td>Understanding and awareness that tourism is an economic driver</td>
<td>✔️</td>
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<td>✔️</td>
</tr>
<tr>
<td>Business plans – understanding what it is and how to make one; that it’s not just to make money but to also benefit and share with the community</td>
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<tr>
<td>Building partnerships in the community and offshore</td>
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<tr>
<td>Needs to begin with building trust and relationships for business start-ups</td>
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<td>✔️</td>
</tr>
</tbody>
</table>
What are the greatest challenges that you see with growing Indigenous tourism in Ontario?

<table>
<thead>
<tr>
<th>What are the greatest challenges that you see with growing Indigenous tourism in Ontario?</th>
<th>Support &amp; Awareness</th>
<th>Governance &amp; Standards</th>
<th>Economic Assistance</th>
<th>Education</th>
<th>Social Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training</td>
<td>✔️</td>
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<tr>
<td>Authenticity</td>
<td></td>
<td></td>
<td>✔️</td>
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<tr>
<td>Buy-in from different areas / endorse / innovative</td>
<td>✔️</td>
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<tr>
<td>Competition – with general tourism products</td>
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<td>✔️</td>
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<tr>
<td>Funding</td>
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<td>✔️</td>
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<tr>
<td>Promotion and advertising</td>
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<tr>
<td>Interactive websites</td>
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<tr>
<td>Partnerships with non-Native organizations</td>
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<tr>
<td>Cultural confidence – understanding what could be offered</td>
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<td>✔️</td>
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<tr>
<td>Conflict in accessing economics in relationship to the cultural product</td>
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<tr>
<td>Perception of guest expectations vs. reality</td>
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<tr>
<td>Not all tourists expect take aways, most prefer knowledge</td>
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<tr>
<td>Fear – cultural appropriation</td>
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<tr>
<td>Guidelines / criteria – Indigenous authenticity</td>
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<tr>
<td>Socio-economic conditions of communities and members</td>
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<tr>
<td>No availability of clean drinking water, adequate housing</td>
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<tr>
<td>Priorities of Chiefs and Councils</td>
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<td>✔️</td>
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<tr>
<td>General community readiness</td>
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<tr>
<td>Other ongoing lands issues (i.e. land claims)</td>
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<td>✔️</td>
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<tr>
<td>Balance – protecting vs. showcasing sacred sites (i.e. pictographs)</td>
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<td>✔️</td>
</tr>
</tbody>
</table>
What are Ontario’s greatest Indigenous tourism assets?

<table>
<thead>
<tr>
<th>What are Ontario’s greatest Indigenous tourism assets?</th>
<th>People</th>
<th>Land /Environment</th>
<th>Culture - Heritage</th>
<th>Traditional Knowledge</th>
<th>Unique Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land base—different areas and territories</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Plants and species at risk</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Culture / people</td>
<td>✔️</td>
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<tr>
<td>Ways of doing things (practices) — from beginning to the end</td>
<td>✔️</td>
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<tr>
<td>Knowledge / teachings in different territories</td>
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<tr>
<td>Geology / geography (interpretive trails)</td>
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<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Unique experiences</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Workforce (youth opportunities)</td>
<td>✔️</td>
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<tr>
<td>Stories of the area / land</td>
<td>✔️</td>
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<tr>
<td>Different opportunities / activities (e.g., Pow Wow guide, make an app)</td>
<td>✔️</td>
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<tr>
<td>Cultural diversity, including multi-language</td>
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<tr>
<td>Recent meeting of cultures — “new phenomenon”</td>
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<tr>
<td>Local talent</td>
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<tr>
<td>Artist connection</td>
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<tr>
<td>Women</td>
<td>✔️</td>
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<tr>
<td>Youth</td>
<td>✔️</td>
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</tbody>
</table>
### Sault Ste. Marie

**What do we need at a community level to grow Indigenous Tourism in Ontario?**

<table>
<thead>
<tr>
<th>What do we need at a community level to grow Indigenous Tourism in Ontario?</th>
<th>Product Development</th>
<th>Marketing &amp; Promotion</th>
<th>Capacity Building</th>
<th>Community Support &amp; Awareness</th>
<th>Partnerships &amp; Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>The wider community needs to understand, respect and appreciate the Indigenous history of the area</td>
<td>✔</td>
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<tr>
<td>We need to listen to the stories</td>
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<tr>
<td>Communities need to build opportunities for people to connect with nature (e.g. create infrastructure, trails, etc.)</td>
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<tr>
<td>Need people from Indigenous communities to share their culture and history, especially with youth and working with students at schools (more workshops)</td>
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<tr>
<td>More awareness from the general public about the Indigenous community (e.g. June 21st event, Pow Wows)</td>
<td>✔</td>
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<tr>
<td>Capacity in the Indigenous community to develop programs and products</td>
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<tr>
<td>Integration into the school system</td>
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<tr>
<td>Promotion of events and involvement in community events/opportunities – community engagement promotes buy-in and awareness</td>
<td>✔</td>
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<tr>
<td>Creating a workforce of Indigenous peoples – education, respect, inclusive</td>
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<tr>
<td>Promote volunteerism</td>
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<tr>
<td>Organisations like ITD for building resources</td>
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<tr>
<td>Access to funding</td>
<td>✔</td>
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<tr>
<td>Inter-Nation / Tribe networking</td>
<td>✔</td>
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<tr>
<td>Solid vision / foundation to build from</td>
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<tr>
<td>Recognising what we already have</td>
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<tr>
<td>Marketing – keeping it in the forefront</td>
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<tr>
<td>Product development</td>
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<tr>
<td>Chief and Council support</td>
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<tr>
<td>Pride in the services and what you want to offer</td>
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<tr>
<td>Elders and youth – involved to share history, knowledge, teachings (7 Fires) and stories of Indigenous culture</td>
<td>✔</td>
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<tr>
<td>Welcoming individuals from outside the community to participate and learn</td>
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<tr>
<td>Rebranding the tourism theme (unified)</td>
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<tr>
<td>Other tourism businesses to support one another – acknowledgement / recognition for front line workers (benefits and incentives will create pride and promotion)</td>
<td>✔</td>
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</tr>
</tbody>
</table>
What are the greatest challenges that you see with growing Indigenous tourism in Ontario?

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Support &amp; Awareness</th>
<th>Governance &amp; Standards</th>
<th>Economic Assistance</th>
<th>Education</th>
<th>Social Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of funding (for marketing, promotion and development)</td>
<td>✔️</td>
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<tr>
<td>Lack of teachers and Elders</td>
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<tr>
<td>Lack of infrastructure</td>
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<tr>
<td>Capacity development</td>
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<tr>
<td>Awareness from a First Nations perspective – ignorance</td>
<td>✔️</td>
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<tr>
<td>Employment – lack of interest, skills and incentives</td>
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<tr>
<td>Community buy-in and not seeing the full benefit that tourism can provide</td>
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<tr>
<td>Lack of support</td>
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<tr>
<td>Transfer of intergenerational knowledge – difficulty to have an Elder transfer the knowledge</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Sacred items (sharing stories) – not know what is “ok” to share (lack of awareness)</td>
<td></td>
<td>✔️</td>
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<tr>
<td>Health of communities – if communities have big issues to deal with (e.g., clean drinking water), it may be a challenge to focus on other things</td>
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<td>✔️</td>
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<tr>
<td>How much do communities want to share of their cultures?</td>
<td>✔️</td>
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<tr>
<td>We need those who are offering experiences to have traditional skills – so important to pass down culture to the youth</td>
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<td>✔️</td>
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<tr>
<td>Just the start of reconciliation</td>
<td>✔️</td>
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<td>✔️</td>
</tr>
<tr>
<td>Preserving what we have (provincial parks, land, etc.)</td>
<td>✔️</td>
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</tr>
<tr>
<td>Standing up for tourism – recognizing the economic impact</td>
<td>✔️</td>
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</tr>
<tr>
<td>Cultural appropriation</td>
<td></td>
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<td>✔️</td>
</tr>
<tr>
<td>Keep it real – intellectual property</td>
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</tbody>
</table>
What are Ontario’s greatest Indigenous tourism assets?

<table>
<thead>
<tr>
<th>What are Ontario's greatest Indigenous tourism assets?</th>
<th>People</th>
<th>Land /Environment</th>
<th>Culture - Heritage</th>
<th>Traditional Knowledge</th>
<th>Unique Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very present and active First Nations</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Organizations supporting / training for outdoor experiences</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
</tr>
<tr>
<td>Landscape, natural resources and the diversity across the province – riverways, waterways, forests, shorelines, access to amazing ecosystems that are vast wild and clean</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Presence of connective waterways</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Network of national and provincial parks and the Boreal forest</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Events that are already there (not building from nothing)</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Cultural camps</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Landscape – waterways (travel), stories, history, First Nations members and area</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Culture, tradition and presence</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Distinct histories that need to be shared</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Teachings</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Language = culture (needs to continue)</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>133 First Nations in Ontario</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Provincial awareness and understanding</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Stories and traditions</td>
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<tr>
<td>We have the materials, resources, medicines available to create experiences and support them</td>
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</tbody>
</table>
Thunder Bay

What do we need at a community level to grow Indigenous Tourism in Ontario?

<table>
<thead>
<tr>
<th>What do we need at a community level to grow Indigenous Tourism in Ontario?</th>
<th>Product Development</th>
<th>Marketing &amp; Promotion</th>
<th>Capacity Building</th>
<th>Community Support &amp; Awareness</th>
<th>Partnerships &amp; Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>A sense of community ownership (advocacy and allies)</td>
<td>✔</td>
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<tr>
<td>More examples of best practices</td>
<td>✔</td>
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<tr>
<td>Resources to travel to and learn from</td>
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<tr>
<td>Understand what tourists want</td>
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<tr>
<td>Resources for entrepreneurs (take an idea and turn it into an experience)</td>
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<td>Include community input – time to prepare</td>
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<td>Inclusivity between communities small and large</td>
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<tr>
<td>Relationships and partnerships (existing operators and funding sources)</td>
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<tr>
<td>Education regarding tourism</td>
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<tr>
<td>Visitor expectations</td>
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<tr>
<td>Fundamentals of business and business savviness</td>
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<tr>
<td>Community needs to accept / want tourism – building an interest</td>
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<tr>
<td>Build confidence amongst community members – encouraging and conquering shame / fear</td>
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<tr>
<td>Selling it somehow diminishes its sacredness</td>
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<tr>
<td>Promoting ideas</td>
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<td>Training and mentoring – educating the youth</td>
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<tr>
<td>Have coordinators (e.g., at the hotels) who make arrangements with the guides, or have an experience broker</td>
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<tr>
<td>Access to information sharing (contacts, experiences, coordination)</td>
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<tr>
<td>Acquiring funding and navigating funders (keep it simple)</td>
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</tbody>
</table>
What are the greatest challenges that you see with growing Indigenous tourism in Ontario?

<table>
<thead>
<tr>
<th>What are the greatest challenges that you see with growing Indigenous tourism in Ontario?</th>
<th>Support &amp; Awareness</th>
<th>Governance &amp; Standards</th>
<th>Economic Assistance</th>
<th>Education</th>
<th>Social Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of available training</td>
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<tr>
<td>Remote/isolated locations</td>
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<tr>
<td>Lack of interest in sharing</td>
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<tr>
<td>Fear – was illegal up until just a few decades ago, e.g. Pow Wows, language</td>
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<td>✔</td>
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<tr>
<td>Lack of coordination – who leads, e.g. Band, DDO, ITO</td>
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<tr>
<td>Basic business skills training, e.g. business planning, accounting, regulations/laws</td>
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<tr>
<td>Who defines ‘authentic’?</td>
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<tr>
<td>Elder/ grandparents haven’t even shared teachings with children/grandchildren – priorities</td>
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<td>Should be ‘retired’ or not still ‘working’</td>
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<td>Funds</td>
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<tr>
<td>Local capacity – skill set</td>
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<td>Transportation</td>
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<tr>
<td>Maintaining authenticity, respect and meaningful collaboration</td>
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<td>Cultural acceptance and education</td>
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<td>Connectivity, Wi-Fi</td>
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<td>Check points for dry communities</td>
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<td>Food supplies – wild game/ fish regulations</td>
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<td>Presentation, interpretation and education</td>
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<tr>
<td>Community acceptance of visitors</td>
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<tr>
<td>Marketing – access, representation and dollars</td>
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<td>Geography – access, affordability</td>
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<td>Indigenous diversity</td>
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<td>Trust – colonization</td>
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<tr>
<td>Government’s (feds, provincial, municipal) dedication to tourism</td>
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<tr>
<td>Handicrafts (time, labour, fair pricing, experiences, understanding)</td>
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</tbody>
</table>

- Support & Awareness
- Governance & Standards
- Economic Assistance
- Education
- Social Issues
What are Ontario’s greatest Indigenous tourism assets?

<table>
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<tr>
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<th>Culture - Heritage</th>
<th>Traditional Knowledge</th>
<th>Unique Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>The people</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Concept of sharing</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>The regional differences in art/crafts, tools, medicines</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Language</td>
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<td>✔️</td>
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<tr>
<td>Relationship with plants, animals, environment</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Sharing access to the land</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Away from the busy urban settings</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>The experience of time on the land (connection)</td>
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<td>✔️</td>
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<tr>
<td>Big water/fresh water/drinking water</td>
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<tr>
<td>Scenery/lookouts/visionscapes</td>
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<tr>
<td>Fish and game</td>
<td>✔️</td>
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<tr>
<td>Indigenous peoples used to guide more, now the Americans are very independent and unchained</td>
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<tr>
<td>Musicians, artists and artisans</td>
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<tr>
<td>Experimentation</td>
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<tr>
<td>Asking lots of questions regarding reconciliation and authenticity</td>
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<tr>
<td>T.E.K. – traditional ecological knowledge</td>
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<tr>
<td>Hesitancy to share, e.g. pictographs</td>
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<tr>
<td>Stories/legends</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Unique experiences, e.g. picking wild rice, sleeping under a canoe/ in a tepee/ in a wigwam / making a birch bark basket</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>4 distinct seasons with different events in each</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>People, stories, traditions, culture, water, landscape</td>
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<tr>
<td>Pow Wows</td>
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<td>Food, fall harvest</td>
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<tr>
<td>Fishing and berry picking</td>
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<tr>
<td>History – treaty sites, pictographs</td>
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<tr>
<td>Clothing – arts and crafts, beading, snowshoe making</td>
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<tr>
<td>Transmission of knowledge/stories and cultural sharing</td>
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<tr>
<td>Opportunity for education</td>
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<tr>
<td>Preservation of culture</td>
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<tr>
<td>Environment (proximity, intimate relationship, abundance)</td>
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<tr>
<td>Traditional knowledge and community champions of culture</td>
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</tbody>
</table>
Kenora

What do we need at a community level to grow Indigenous Tourism in Ontario?

<table>
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<th>What do we need at a community level to grow Indigenous Tourism in Ontario?</th>
<th>Product Development</th>
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<th>Partnerships &amp; Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>History of the land</td>
<td>✔️</td>
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<tr>
<td>Providing a platform to share</td>
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<tr>
<td>Sustaining our language</td>
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<td>✔️</td>
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<tr>
<td>Improving infrastructure (including accommodation and linkages to existing infrastructure)</td>
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<tr>
<td>Leadership – or a catalyst</td>
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<tr>
<td>Elder involvement in the following – a vision, a plan, tools to assist and people</td>
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<td>✔️</td>
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<tr>
<td>Involving the whole community – youth, Elders, etc.</td>
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<td>Training (e.g. heritage interpreter)</td>
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<tr>
<td>Communications</td>
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</tbody>
</table>

Product Development
Marketing & Promotion
Capacity Building
Community Support & Awareness
Partnerships & Investment
What are the greatest challenges that you see with growing Indigenous tourism in Ontario?

<table>
<thead>
<tr>
<th>What are the greatest challenges that you see with growing Indigenous tourism in Ontario?</th>
<th>Support &amp; Awareness</th>
<th>Governance &amp; Standards</th>
<th>Economic Assistance</th>
<th>Education</th>
<th>Social Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Racism – them and us mentality</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Existing, non-authentic place names, symbols lead to misunderstanding (expropriation of the culture)</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Capacity</td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Priorities within communities – facing bigger issues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Visibility</td>
<td>✔️</td>
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<td></td>
<td>✔️</td>
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<tr>
<td>Accommodations</td>
<td></td>
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<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Understanding the difference between sharing the culture and protecting the sacred</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Making a living – guide, promoter, etc.</td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Funding dollars to help support and grow entrepreneurs and businesses</td>
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<td>✔️</td>
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<tr>
<td>Conflict of interest</td>
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<td></td>
<td>✔️</td>
<td>✔️</td>
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</tr>
<tr>
<td>Technology that overrides the authenticity of the Indigenous tourism product</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
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</tbody>
</table>
What are Ontario’s greatest Indigenous tourism assets?

<table>
<thead>
<tr>
<th>What are Ontario’s greatest Indigenous tourism assets?</th>
<th>People</th>
<th>Land /Environment</th>
<th>Culture - Heritage</th>
<th>Traditional Knowledge</th>
<th>Unique Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variety of experiences – travel between locations</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✗</td>
</tr>
<tr>
<td>Natural resources – space, rocks, trees, lakes</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>People/community members</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unique culture/skills</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Land skills (living off the land)</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discovering medicine in wild ginger</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>History and heritage – traditional teachings</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pow Wows</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Youth/Elder teaching centres</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kay Nah Chi Wah Nung Historical Centre</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seine River</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Size and location of communities lends itself to an authentic experience</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food – wild rice, blueberries</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Traditions</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What do we need at a community level to grow Indigenous Tourism in Ontario?

<table>
<thead>
<tr>
<th>What do we need at a community level to grow Indigenous Tourism in Ontario?</th>
<th>Product Development</th>
<th>Marketing &amp; Promotion</th>
<th>Capacity Building</th>
<th>Community Support &amp; Awareness</th>
<th>Partnerships &amp; Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have to know the community</td>
<td>✔</td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Relationships</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Understanding of what is unique to the community (i.e. Astrolabe at Pickawistanag) Algonguin Cultural Centre</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Golden Lake Powwow = above and beyond superficial promotion</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Agreement of what and how those experiences are promoted and understanding of benefits</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trust and mutual respect</td>
<td></td>
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<tr>
<td>Buy in at all levels- gov’t, municipal, etc.</td>
<td></td>
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<td></td>
<td>✔</td>
</tr>
<tr>
<td>Prioritization as important</td>
<td></td>
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<td>✔</td>
</tr>
<tr>
<td>Strengthened relationships with indigenous group and leadership from.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Understanding approaches - Circumstance/groups/individuals/linear vs. fluid</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Greater sharing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Leadership in building bridges b/w Indigenous + non-Indigenous conversations + merging of perspectives</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Education</td>
<td></td>
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<td></td>
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<tr>
<td>Front-line training</td>
<td></td>
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<td>✔</td>
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<tr>
<td>Asset mapping and strategy development</td>
<td></td>
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<td>✔</td>
</tr>
<tr>
<td>Funding to grow tourism</td>
<td></td>
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</table>
What are the greatest challenges that you see with growing Indigenous tourism in Ontario?

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Support &amp; Awareness</th>
<th>Governance &amp; Standards</th>
<th>Economic Assistance</th>
<th>Education</th>
<th>Social Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education/awareness</td>
<td>✔️</td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Fear of doing/doing the wrong thing</td>
<td></td>
<td>✔️</td>
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</tr>
<tr>
<td>Nuances of Indigenous groups</td>
<td>✔️</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Finding, developing, funding experiences</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Operational approaches</td>
<td>✔️</td>
<td></td>
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</tr>
<tr>
<td>Finding the right people to connect with protocols</td>
<td></td>
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<td></td>
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<tr>
<td>Building community bridges</td>
<td></td>
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<tr>
<td>Skepticism around the intention</td>
<td></td>
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<tr>
<td>Gap between visitor expectations and product</td>
<td></td>
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<td></td>
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<tr>
<td>Inconsistencies regarding Indigenous protocols</td>
<td></td>
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</tr>
<tr>
<td>Lacking market readiness</td>
<td></td>
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<tr>
<td>Unclear who to talk to/what the process is</td>
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<tr>
<td>Sense of urgency varies</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Lack of awareness</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of funding</td>
<td></td>
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</tr>
<tr>
<td>Is ITD the champion?</td>
<td></td>
<td></td>
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<tr>
<td>Lack of cultural understanding between Indigenous and non-Indigenous communities</td>
<td></td>
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<tr>
<td>Lack of involvement by Chief and Councils</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Understanding of economic benefits for indigenous community (what’s in it for me?)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What are Ontario’s greatest Indigenous tourism assets?

<table>
<thead>
<tr>
<th>What are Ontario's greatest Indigenous tourism assets?</th>
<th>People</th>
<th>Land /Environment</th>
<th>Culture - Heritage</th>
<th>Traditional Knowledge</th>
<th>Unique Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>The people and their stories</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Cultural events/festivals</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>St. Lawrence River (&quot;Garden of the Great Spirit&quot;)</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Natural history</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Wabano Centre (in Ottawa)</td>
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<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Victoria Island</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Waterways: Bay of Quinte (canoe) to the Ottawa River</td>
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<td>✔️</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Birch halls you can smoke in</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Opportunity for experiential tourism</td>
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<td>✔️</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Maniwaki Kigigan 2bi</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>The land itself</td>
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<td>✔️</td>
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<td>✔️</td>
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<td>Outdoor adventure</td>
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<td>Seasons</td>
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<tr>
<td>Turtle Island</td>
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<td>✔️</td>
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<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Alginaquon Park</td>
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</tr>
<tr>
<td>Golden Lake Pow Wow</td>
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<td>✔️</td>
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<tr>
<td>Nation’s Capital</td>
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</tr>
<tr>
<td>Home to national associations</td>
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<td>✔️</td>
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<tr>
<td>Canadian Museum of History</td>
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<td>✔️</td>
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<tr>
<td>Canadian Canoe Museum</td>
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<td>✔️</td>
</tr>
<tr>
<td>Concentration of Indigenous Peoples in Ontario and Quebec</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
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</tr>
</tbody>
</table>
4.5 Regional summary

What do we need at a community level to grow Indigenous Tourism in Ontario?

[Bar chart showing the percentage of responses for different communities and categories: Product Development, Marketing & Promotion, Capacity Building, Community Support & Awareness, Partnerships & Investment.]

- **Toronto**
- **Sudbury**
- **Sault. Ste Marie**
- **Thunder Bay**
- **Kenora**
- **Ottawa**
What are the greatest challenges that you see with growing Indigenous tourism in Ontario?
What are Ontario’s greatest Indigenous tourism assets?

- Sudbury
- Sault Ste. Marie
- Thunder Bay
- Kenora
- Ottawa

- People
- Land / Environment
- Culture - Heritage
- Traditional Knowledge
- Unique offering
4.6 Provincial Summary

Below is a combined summary of the responses from all 6 locations in which the regional workshops were conducted.

**What do we need at a community level to grow Indigenous Tourism in Ontario?**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product development</td>
<td>29%</td>
</tr>
<tr>
<td>Marketing &amp; Promotion</td>
<td>15%</td>
</tr>
<tr>
<td>Capacity Building</td>
<td>14%</td>
</tr>
<tr>
<td>Community Support &amp; Awareness</td>
<td>15%</td>
</tr>
<tr>
<td>Partnerships &amp; investment</td>
<td>27%</td>
</tr>
</tbody>
</table>

**What are Ontario’s greatest Indigenous tourism assets?**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>People</td>
<td>23%</td>
</tr>
<tr>
<td>Land /Environment</td>
<td>17%</td>
</tr>
<tr>
<td>Culture - Heritage</td>
<td>21%</td>
</tr>
<tr>
<td>Traditional Knowledge</td>
<td>21%</td>
</tr>
<tr>
<td>Unique offering</td>
<td>19%</td>
</tr>
</tbody>
</table>

**What are the greatest challenges that you see with growing Indigenous tourism in Ontario?**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support &amp; Awareness</td>
<td>20%</td>
</tr>
<tr>
<td>Governance &amp; Standards</td>
<td>26%</td>
</tr>
<tr>
<td>Economic Assistance</td>
<td>17%</td>
</tr>
<tr>
<td>Education</td>
<td>16%</td>
</tr>
<tr>
<td>Social Issues</td>
<td>22%</td>
</tr>
</tbody>
</table>
5.0 Building a Strong Industry

5.1 Aligning with Canada’s Vision for Indigenous Tourism

ITO is committed to aligning with the strategies of its partners in order to create a strong and unified Indigenous tourism industry for Ontario. By collaborating, sharing utilizing the knowledge, research and resources of organizations such as ITAC, Destination Canada, Destination Ontario and TIAO, ITO will be much better positioned to serve its members and Indigenous communities.

Indigenous Tourism Association of Canada (ITAC)

ITAC is the national leader, guiding the development of Indigenous tourism in our country and has contributed greatly to the growth of the industry. Thus far, ITAC has done an excellent job of fulfilling one of its mandates of uniting the Indigenous tourism industry in Canada. The purpose of ITAC is to improve the socio-economic situation of Indigenous peoples within the 10 provinces and 3 territories of Canada.\textsuperscript{lxvii}

In October of 2018, ITO signed an MOU with ITAC, which over the next 3 years will see ITO aligning with ITAC through its strategic planning, marketing and branding, organizational policies and by-laws, business development approach, research efforts, industry partnership opportunities, and organizational leadership.

ITO is full aligned with ITAC’s New Accelerated Targets for Growth:

- **Revenues** – increase to $2.2B in Canadian GDP by 2024
- **Jobs** – Increase to 49,383 jobs in the Indigenous tourism industry by 2024
- **Businesses** – Increase to 200 export-ready Indigenous tourism businesses by 2024

ITO will continue to be conscious of ITAC’s priorities and learn from its strategic goals to improve the operations in Ontario. ITO is well-versed in ITAC’s strategic pillars and will continue to support, participate and align with its new initiatives planned for 2019-20 according to each of the respective pillars.\textsuperscript{lxviii}

**Development**

- Deliver product development support funding
- Aid and support for workshops and capacity development programs
- Plan and deliver the 2019 International Indigenous Tourism Conference
- Provincial/Territorial support
- Network of regional ITAC representatives

**Marketing**

- Deliver effective and targeted marketing programs involving website, social media and travel trade channels
- Build marketing and sales assets
- Key account strategy and key media strategy
- Focus on investment in assets, storytelling and features; create media story ideas
- Grow earned travel media coverage
- Establish ITAC as leader in Indigenous tourism research

**Leadership**

- Partner with provinces and territories to grow and establish Indigenous tourism associations
- Active ITAC leadership in Indigenous economic development events and the tourism industry
- Awareness of 2019-24 Acceleration Strategy
- Ensure effective financial process for ITAC
- Ensure effective human resources for ITAC
- Explore legislation options to protect and promote authenticity of Indigenous tourism experiences in Canada
- Active ITAC leadership in Indigenous tourism issues and challenges as well as conflict mediation, negotiations and resolutions
- Provide Indigenous tourism research
- Align provincial and territorial planning to ITAC Acceleration strategy targets
- Continue building ITAC’s international reputation as leader in Indigenous tourism
- Creating standard reporting structure for partners
- Establish ITAC as industry leader
Partnerships

- Grow and expand partnerships and explore new partnership agreements to benefit the overall Indigenous tourism industry
- Continue collaborative opportunities and board and committee representation
- Support Indigenous representation on major Canadian tourism associations and organizations
- Support networking opportunities and regional participation in industry meetings
- Increase ITAC membership
- Increase email subscribers and social media audience with regular and meaningful content

In early 2019, the Conference Board of Canada (CBoC) and ITAC released a draft report of the key insights and economic impacts of the Indigenous tourism industry in Canada. Their research insights confirmed that the Indigenous tourism sector represents a mixed economy with a variety of not-for-profit organizations, cooperatives, community-owned ventures, incorporated businesses and a range of sole-proprietors including independent artists and artisans, outfitters, hunters and wilderness guides. This diversity demonstrates the high level of value creation from a tourism standpoint.

The 2019 draft report also indicated that of the above organizations who are involved in Indigenous cultural tourism, a common recommendation was a call for more Indigenous leadership in shaping regional tourism policies. Enriching tourists’ encounters with Indigenous peoples and communities, their traditions and heritage sites was also a recommended focus area. For over 60% of Indigenous tourism businesses who participated in the ITAC/CBoC study indicated that cultural tourism is a priority. ‘Far from simply being growth driven, many of these operators are mission driven to promote local cultures, preserve heritage and support community economic development’.

Generally, in order to strengthen Indigenous tourism in Canada, Indigenous tourism businesses highlighted the need for more investments in tourism training, capacity development, marketing support, access to financing and policies to improve access to capital. In terms of where Indigenous tourism businesses are planning on focusing their investments over the next 3 years, many said hiring and training staff and improvements to their facilities and other infrastructure.

Destination Canada

As Canada’s main destination marketing organization, ITO is very cognizant of Destination Canada (DC)’s presence, strategy and key initiatives in the global tourism marketplace. ITO will continue to look to DC for guidance in targeting key international markets. In addition, ITO will align its efforts to achieve DC’s specific goals of inciting nearly 1.5 million additional travellers to Canada, spending $1.9 billion by 2022, particularly targeting the Chinese market.

Key markets as identified by DC will be top-of-mind for ITO for its marketing and product development activities. Leisure travellers will be high priority, while business markets will also be of secondary importance for potential ‘add-on’ travel experiences.

Destination Canada Leisure Markets:
- Australia
- China
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- United Kingdom
- United States

Destination Canada Business Markets:
- Belgium
- France
- Germany
- United Kingdom
- United States

DC’s Strategic Plan: North Star 22 offers valuable insight, and its top 2 objectives will serve to guide ITO in some of its organizational endeavours moving forward:

North Star 22 – Objective 1: Increase demand for Canada with innovative marketing
- Poetry and plumbing (telling a compelling story and harnessing digital technologies and distribution channels)
- Year of Canada-China Tourism
- Connecting America
- Business events
North Star 22 – Objective 2: Advance the commercial competitiveness of the tourism sector

- Enhanced consumer data
- Marketing dashboard
- Trade strategy
- Partnerships

Lastly as an additional guiding light, ITO will look to DC for defining Canada’s value proposition, which will be considered and capitalized on and integrated into ITO’s provincial strategy. Canada offers – and is seen by potential visitors to offer – many attractive qualities that are foundations for the tourism sector. These include:

- A safe, welcoming environment
- Vibrant, livable cities
- Many natural attractions
- Seasonal offerings
- Cultural variety

Government of Canada

Canada’s New Tourism Vision, which was launched in May of 2017 adopts a 5-year, whole-of-government approach to increasing the number of international tourists who come to Canada. ITO is prepared to support and align its efforts with this vision that will seize the global opportunity that tourism offers.

Canada’s New Tourism Vision articulates key policy shifts to remove travel barriers, encourages new product development and establishes sustained investments in tourism marketing in support of growth. The Tourism Vision is defined by 3 pillars - marketing, access, and product - with concrete targets for each.

Marketing:

- Stabilized funding for Destination Canada
- The Connecting America campaign
- The Millennial Travel Program
- Harnessing the digital economy and innovative technologies

Access:

- Lifting the visa requirements for Mexican Nationals
- Expanding the Visa Application Centre network
- Expansion of the Electronic Travel Authorization Program
- Liberalizing Canada’s bilateral air transport agreements
- Exploring options to clarify the permit requirements for the Northern Cruise Line industry
- Improving accessible transportation in Canada

Product:

- Growing Indigenous tourism
- A strategic plan for the Chinese market
- Growing LGBTQ2 tourism
- Distinguishing Canada as a premier tourism destination through Canada’s national parks
- Growing culinary tourism
- Celebrating Canada’s Francophone heritage
- Promoting Canadian arts and culture internationally
- Investing in our regionally diverse tourism offering
- Investing in tourist sector jobs and skills training
- Strengthening Canada’s tourism data and metrics

It is important for ITO to be aware of the above strategies and initiatives being undertaken by the Canadian government to increase visitors, support growth of the industry and increase the presence of Canada on the world stage. Almost all of the initiatives detailed above directly or indirectly support the growth of Indigenous tourism.

Tourism Industry Association of Canada (TIAC)

ITO fully supports and aligns with the TIAC, which in February of 2019, called upon the federal government to support the $97.4B travel economy. In recent years, Canada’s market share of international tourism has not kept pace with the growth of other countries. TIAC is calling on the government to employ a whole-of-government approach to public policy and implement measures within the following priority areas:

- Labour (particularly federal funded, skill and capacity programs that prioritize tourism jobs and support underrepresented labour pools such as Indigenous youth)
- Access – Visa Processing/Barriers to Entry
- Cost Competitiveness
- Marketing Funding to Support Tourism
5.2 Aligning with Ontario’s Tourism Vision

Destination Ontario

As the province’s official destination marketing organization, Destination Ontario (legally known as the Ontario Tourism Marketing Partnership Corporation (OTMPC)) is a crucial key partner for the Indigenous tourism industry and one that ITO values greatly. In the coming years, it will be important for ITO to align itself with the goals and strategies of Destination Ontario, as laid out in their three-year Strategic Playbook 2018-2021 and annual Business and Marketing Plans.

Destination Ontario’s strategic priorities from their Playbook include:

- Visitor First Marketing – Destination Ontario will start with an empathetic understanding of the traveller’s needs, interests, planning and purchase behaviour and will focus marketing campaigns on inspiring consumers through their passions and interests. They will map out and establish the best possible position in the visitor path to purchase and focus efforts there to inspire travel to and around Ontario. They will have modern marketing campaigns informed by data and analytics and emerging technology and marketing trends will inform the mediums they market in and activities undertaken.

- Re-Defining Partnerships – Destination Ontario will lead all partners to align and collaborate toward mutual success. By leveraging a co-marketing approach, we can deliver a greater return on investment. In priority markets, domestically and internationally, we will define and clarify our role and align with our partners.

- Strong Research, Strong Outcomes – Destination Ontario will develop a holistic research approach, prioritizing research and improving how data is mined to incorporate insights into strategic planning and in all marketing activities across the organization. It is their goal to be a provincial leader in the area of research and share findings with partners.

- Dynamic Organization – Destination Ontario will CONNECT, LEAD and INSPIRE a collaborative approach within their organization and with partners. They aim to be nimble, have the ability to quickly adapt to changes in the marketing landscape, regularly evaluate program performance and collaborate with a common goal and vision.

In addition, the most recent available OTMPC Business Plan, from 2017-18, lays priorities that resonate with ITO, including:

1. Build and deliver the case for investment
2. Build a powerful brand that drives results
3. Develop and execute an effective partnership strategy
4. Embrace organizational innovation and effectiveness

Ontario Government

During the writing of this research report, the Ministry of Tourism, Culture and Sport (MTCS) was in the process of conducting consultations for its new tourism strategy. The most recent provincial strategy currently available is the Strategic Framework for Tourism in Ontario.

The Strategic Framework defines the approach that Ontario will use to create a province-wide, united tourism industry. The following strategies outline the proposed approach:

Marketing Strategically

- Building more alignment and efficiencies in Ontario’s tourism marketing system
- Promoting a meaningful Ontario brand with consistent messaging
- Ensuring quality tourism products are offered to the right markets at the right time (market-focused approach)
- Providing common, realistic and meaningful performance metrics

Leveraging the Regional Tourism Approach

- Review the Regional Tourism Organization Funding Formula
- Building more partnership opportunities to encourage tourism development
- Increase opportunities for collaboration to enhance tourism products
- Measure progress through outcome-focused and meaningful performance metrics

Improving the Tourism Workforce

- Coordinate with other ministries to address workforce gaps and needs
- Better connect colleges to opportunities in the industry and continue working with partners to address barriers to attracting more tourism-focused career seekers

Improving the Business Climate

- Modernize regulatory requirements through transparency of government planning and processes and streamlining administrative process
- Review existing legislation which no longer reflects the modern-day tourism industry
- Develop an integrated strategy for the sharing economy and home sharing in Ontario

ITO will continue to work and collaborate with its critical partners such as the MTCS to ensure that its organizational objectives are aligned with those of the provincial tourism industry as a whole. For the MTCS Tourism Action Plan 2016, see appendix D.
Tourism Industry Association of Ontario (TIAO)

TIAO is considered as the voice for tourism in Ontario. Their work consists largely of advocating the importance of tourism as an economic driver and job creator and serving the interests of Ontario’s tourism industry and businesses. ITO signed an MOU with TIAO in 2018 and is an important partner for the Indigenous tourism industry in Ontario.

TIAO’s organizational objectives are as follows:

- Raising the profile and economic importance of Ontario’s tourism and hospitality industry with government, media and the public
- Providing industry input and perspective on government policy that has the potential to impact the tourism industry
- Working with other tourism industry organizations to respond to critical issues in a timely manner
- Advocating further investment in Ontario’s tourism industry
- Informing member organizations of important announcements and developments impacting industry
6.0 Reconciliation Through Indigenous Tourism

6.1 Understanding Reconciliation

Some may view Indigenous tourism as a topic far removed from reconciliation. In 2008, when the Government of Canada issued a formal apology to the former students of Indian Residential Schools, the concept of reconciliation in Canada was somewhat new for many people. Since then, the term reconciliation has grown to encompass a broader context of recognizing and addressing the Government’s attempt to assimilate and decimate Indigenous cultures in Canada. Although residential schools played a large role in Canada’s Indigenous cultural genocide, there are many other contributing policies, historical events and underlying prejudices that have permeated our society for centuries.

The Final Report of the Truth and Reconciliation Commission of Canada released in 2015 is perhaps the most thorough document detailing the damages done by Canada’s residential school system and the first steps required towards the long process of reconciliation. The report states that:

For over a century, the central goals of Canada’s Aboriginal policy were to eliminate Aboriginal governments; ignore Aboriginal rights; terminate the Treaties; and, through a process of assimilation, cause Aboriginal peoples to cease to exist as distinct legal, social, cultural, religious, and racial entities in Canada.

Strong attempts were made to extinguish Indigenous culture and the lasting impacts have been severe. However, the culture has survived and in order for true reconciliation to take place, a resurgence and revitalization of Indigenous culture needs to happen. This is where Indigenous tourism comes into play. Cultural expression, learning and growth can be facilitated by welcoming visitors (especially non-Indigenous Canadians) to engage in Indigenous traditions, beliefs and ways of life.

Despite the coercive measures that the government adopted, it failed to achieve its policy goals. Although Aboriginal peoples and cultures have been badly damaged, they continue to exist. Aboriginal people have refused to surrender their identity.

Need for Reconciliation Through Tourism

Since Canada’s formal apology in 2008, there has been a debatable amount of progress towards reconciliation.

The urgent need for reconciliation runs deep in Canada. Expanding public dialogue and action on reconciliation beyond residential schools will be critical in the coming years. Although some progress has been made, significant barriers to reconciliation remain.

Tourism presents an excellent opportunity for Indigenous peoples and the Canadian Government to move forward towards a common, mutually beneficial goal, which is also in the spirit of reconciliation. With an increased interest in Indigenous tourism on a global scale and the potential economic return that it offers not only Indigenous communities, but the tourism economy as a whole; Indigenous tourism is a viable option for both parties.

Understanding Indigenous worldviews and integrating them into policies, institutions and customs is crucial for Canada to move forward with reconciliation. This begins with recognizing the rights of Indigenous peoples and establishing Indigenous well-being as a priority. Tourism is no exception. Indigenous tourism should be developed based on Indigenous worldviews and governance. This will in turn, ensure that the growth of Indigenous tourism provides direct and significant benefits for its primary stakeholders, Indigenous people.
In a 2018 report released by the Social Sciences and Humanities Research Council of Canada, several of the key messages are directly applicable and should be considered for the development of tourism within Indigenous communities:

- The preservation and resurgence of Indigenous culture — including languages, art and ways of life — are increasingly driven by community-level decision-making and supported by the active participation of youth.
- Research strongly recognizes Elders’ contributions to well-being and intergenerational solidarity. However, institutional ways of assessing aspects of social well-being tend not to adequately reflect Indigenous perspectives.
- To meet economic, social and cultural goals, Indigenous communities are turning to entrepreneurship and co-operative businesses that reflect their needs and worldviews. Certain business theories and partnerships can, alternatively, be disempowering for Indigenous peoples.

Ontario’s Commitment to Reconciliation

In 2016 the Ministry of Indigenous Affairs published *Ontario’s Commitment to Reconciliation* which details the long-lasting and profound impacts that the residential school system has had. The report also details the steps that the Ontario Government is willing to take to reconcile with Indigenous people within the province. The Government vowed to support the strengthening of Indigenous culture and work towards a more equitable relationship in an attempt to address the disparities in socioeconomic status between Indigenous and non-Indigenous people.

The Provincial Government has also committed to building strong national partnerships with Indigenous Nations.

In recent years, Ontario has benefitted from the support of Indigenous partners to take a strong national leadership role on issues of importance to Indigenous people. Ontario is encouraged by new efforts by the federal government to revitalize its relationship with Indigenous leaders and communities. We need to work with federal and Indigenous partners to build on these efforts to make real change in the lives of Indigenous people. Stronger partnerships must lead to real results.

If implemented correctly, tourism has the potential to preserve Indigenous culture while promoting socio-economic growth in communities. ITO is currently working towards this mandate in hopes of representing communities and businesses across Ontario who want to pursue tourism for their own benefit and prosperity. If the Ontario Government is committed to furthering reconciliation in the province, investing in Indigenous tourism would be a worthwhile option.

6.2 Supporting the Truth & Reconciliation Commission

Indigenous tourism holds a great deal of potential for contributing to reconciliation in Ontario, some of which include:

- Strengthening Indigenous society and culture, demonstrating its importance, and recognizing its value in the modern world
- Intrinsic growth for youth and community members
- Economic, business, and entrepreneurial opportunities

ITO’s efforts and mandate to foster growth and resiliency throughout the provincial Indigenous tourism sector specifically supports 3 Calls to Action of the Truth and Reconciliation Commission of Canada:

43. We call upon federal, provincial, territorial, and municipal governments to fully adopt and implement the United Nations Declaration on the Rights of Indigenous Peoples as the framework for reconciliation.

57. We call upon federal, provincial, territorial, and municipal governments to provide education to public servants on the history of Aboriginal peoples, including the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaties and Aboriginal rights, Indigenous law, and Calls to Action, Aboriginal–Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.

92. We call upon the corporate sector in Canada to ensure that Aboriginal peoples have equitable access to jobs, training, and education opportunities in the corporate sector, and that Aboriginal communities gain long-term sustainable benefits from economic development projects.
6.3 Reconciliation: Hearing All Voices – Survey Results

As a part of the consultation process for this research report, all Indigenous tourism stakeholders were asked about their opinions relating to reconciliation and the potential that Indigenous tourism holds to contribute to reconciliation on a national level.

Indigenous tourism businesses, communities, individuals and partners who completed the survey and participated in the regional workshops were asked to comment about Indigenous reconciliation in Canada.

Meaning of Indigenous Reconciliation

A common challenge in addressing the effects of residential schools and beginning to undertake reconciliation is understanding the meaning of reconciliation and defining what it looks like. It has come to be understood that reconciliation means many different things to many different people.

Survey participants were asked to explain what reconciliation means to them. The answers were extremely diverse and it is difficult to capture the comments in a summarized report. The intent of sharing this information is not to limit the responses and categorize them but rather to gain a holistic understanding of what reconciliation means to Indigenous tourism stakeholders. The following general results were gathered.

When asked to share what Indigenous reconciliation means, there were several common themes among survey responses.

The most common response is surrounding the concept of education and awareness of the wrong-doings of the past. To many, reconciliation means acknowledging, learning and educating about Canada’s colonial history in order to understand how past events have shaped our contemporary landscape and our responsibility to our treaty relationships. Many survey respondents indicated that in order for reconciliation to take place, we first need to bring to light Canada’s dark past with respect to Indigenous relations and how this affects the day-to-day life of Indigenous peoples currently. There are many Canadians who have a very limited understanding of the cultural genocide that took place until alarmingly recently in our nation’s history. This information needs to be common knowledge, along with the historical significance of the treaties.

The second most common theme among survey responses regarding the meaning of reconciliation is based on the importance of fostering understanding and respect of Indigenous cultures and worldviews. For many, reconciliation means teaching and sharing important Indigenous traditional knowledge and culture and therefore establishing a higher degree of respect.

In addition to the top 2 most prominent themes, there are 5 additional common themes that were discovered based on survey responses, that explain the meaning of reconciliation:

- Healing
- Recognition of past injustice and restoring respect; rebuilding and improving relationships; building bridges and collaborating
- Accepting and growing to forgive the mistakes made by western cultures; letting go of the hurt
- Support for social, cultural and economic growth in Indigenous communities
- Respecting Indigenous experiences and rights and teaching the truth

Lastly, the following list details additional comments and ideas offered by respondents about the meaning of reconciliation. Although these responses were not as common across the board, they are still valuable for understanding the different interpretations of Indigenous reconciliation.

- Returning back to the roots of traditions and cultural values; learning the rich Indigenous culture and language and stopping its decimation
- Establishing a sense of community for everyone; building unity
- Celebrating Indigenous peoples – strong people who are willing to share their stories; empowerment
- Reconciliation needs to be taught; removing stigma and moving forward
- Commitment and opportunity to be heard and respected (including by varying levels of government)
- Equality, fairness, balance and harmony to coexist towards a shared future
- Facilitating the meeting of cultures through personal interaction; acknowledging and respecting the differences among cultures
- Addressing contemporary racism towards Indigenous peoples and the modern genocide that Indigenous peoples are still going through
- Creating an understanding of our relationship to the land
- Self-reliance, self-determination and self-government
- Providing a service in a culturally appropriate way
- Creating opportunities for communities, businesses and individuals
- Dialogue, mutual understanding and acceptance
- Giving back what is rightfully ours – land, lakes and resources
- Breaking away from harsh laws and planning (colonization) directed towards the Indigenous population
- Capitalizing on the changing vision and mentality of the current young Indigenous population

Canadian Ecotourism Services (CES) © 2019 Report
Letting Indigenous communities lead, decide and plan how funding can help their people and community (and freedom from funding competition)

- Economic partnerships that allow Indigenous communities to attain freedom and control and thereby contributing to Canada’s economy through its services and work force

- Providing opportunities to those who experienced oppression and who’ve had opportunities taken from them

- Increase treaty payments

Indigenous Tourism Contributing to Reconciliation

ITO believes that Indigenous tourism, if developed respectfully, has the potential to contribute to reconciliation in Canada. Educating non-Indigenous Canadians and international visitors about the historic events and current realities of Indigenous peoples will have a lasting and profound impact on the future of reconciliation in Canada. Indigenous tourism can serve as a vehicle for cross-cultural awareness and understanding.

As mentioned above, all survey participants were asked about their views surrounding reconciliation and its link to Indigenous tourism. When asked if they felt that Indigenous tourism has the ability to foster reconciliation between Indigenous and non-Indigenous people, 84% of respondents stated yes.

Can Indigenous Tourism Help with Reconciliation in Canada?

Source: Canadian Ecotourism Services

By far, the most common response was using Indigenous tourism as a teaching tool to correct misconceptions and transfer knowledge about Indigenous cultures, beliefs and practices. Fostering understanding and respect through the sharing of stories and knowledge is quite possibly the most powerful aspect of Indigenous tourism and holds great potential for moving reconciliation forward.

Another common theme among survey responses was that Indigenous tourism can help with reconciliation by fostering new and stronger relationships, allowing people to overcome stereotypes and removing social stigma and racism. Creating opportunities for Indigenous and non-Indigenous people to engage, interact and learn about each other’s cultures will, as mentioned above, create understanding and appreciation.

Indigenous tourism can also be used to educate individuals about the historical relationship between Indigenous and non-Indigenous peoples without prejudice. Tourism experiences usually take place in a relaxed environment whereby tourists are open to learning and considering new perspectives. This is an ideal situation for acquiring knowledge about a dark chapter in Canadian history.

Additional responses relating to how Indigenous tourism can foster reconciliation are:

- Encouraging partnerships between Indigenous and non-Indigenous peoples
- Tourism offers economic opportunities
- Creating a safe environment to educate, engage and transform people
- Creating opportunities to engage in land-based activities, develop a connection with the land and take pride in Indigenous territories
- Tourism generates awareness and visibility of Indigenous communities and cultures
- Instilling pride for Indigenous culture by showing the value of cultural teachings and ways of life (traditional and modern)
- Teaching why reconciliation is important, because it is not necessarily understood
- An increased understanding of Indigenous rights, cultures, lifestyle and the current growth of Indigenous business and entrepreneurship
- Opportunities for meeting new people
- Talking about what happened to Indigenous people can take away some of the pressure inside; making what happened known and moving forward
- Exposing tourists to new experiences
- Provide a reason for Indigenous youth to learn their culture in order to share it appropriately with others
- Celebrating cultural differences

Survey participants we asked how they envision Indigenous tourism helping with reconciliation in Canada and the following themes were discovered.
**Elements for Reconciliation Through Tourism**

It has been clearly stated by those who participated in the consultation for this research report that in order for Indigenous tourism to contribute to reconciliation in Canada, there needs to be some degree of experiential education taking place. Given that Indigenous culture is very broad and far-reaching, it may be useful to identify certain areas or topics that will help lay the foundation for reconciliation to take place through Indigenous tourism.

Survey participants were asked to rate the importance of certain elements for inclusion in Indigenous tourism activities or experiences that will promote reconciliation. The most important element for inclusion was sharing information on Indigenous history and culture, including traditions, ways of life, etc. Of almost equal importance, according survey responses, was highlighting the Indigenous relationship to the land. Complete results can be found below.

**Reconciliation: Elements for Inclusion in Tourism Experiences**

Additional elements for inclusion in Indigenous tourism experiences that may foster reconciliation were suggested by survey respondents:

- Utilizing the commonalities amongst all people, especially culturally-based stories and legends
- Opportunities to observe/participate in traditional activities that create a minimal negative environmental impact and capture the core beliefs of Indigenous people
- Positive experiences that leave tourists feeling inspired and hopeful for the future of Indigenous/non-Indigenous relationships
- Traditional foods, cooking methods and the importance of sharing food and eating together
- Clarifying stereotypes and misconceptions
- The relationship between generations; the Elder to youth connection
- Diversity amongst Indigenous cultures/communities
- Protocols when visiting as a tourist – respect and acknowledgement of the lands
- Despite history and what Indigenous people have lost, highlight where Indigenous people are today (maintaining traditional culture in the modern world)
- What Canada looked like before Europeans arrived
- Personal encounters between tourists and Indigenous guides, businesses, operators, etc.
- Teaching Indigenous languages and their significance within the culture
- Storytellers, knowledge keepers and Elders who are willing to share
6.4 Reconciliation: Hearing All Voices – Workshop Results

Toronto

- Using education (in its more formal sense) to promote understanding
- Using stories and cultural teachings to increase awareness
- Recognizing and utilizing the foundational aspects of our cultures (i.e. the land, Elders)
- Ensuring authenticity
- Indigenous tourism product/infrastructure development that educates mainstream tourists
- Supporting Indigenous Policies & Protocol
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<th>How can Indigenous tourism in Ontario be used to promote reconciliation?</th>
<th>Using education (in its more formal sense) to promote understanding</th>
<th>Using stories and cultural teachings to increase awareness</th>
<th>Recognizing and utilizing the foundational aspects of our cultures (i.e. the land, elders)</th>
<th>Ensuring authenticity</th>
<th>Indigenous tourism product/infrastructure development that educates mainstream tourists</th>
<th>Supporting Indigenous Policies &amp; Protocol</th>
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<td>Land acknowledgement</td>
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<td>To open ceremonies</td>
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<td>To participate, collaborate and co-create</td>
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<td>Teach the cultural ways/sensibilities</td>
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<td>Education through an Indigenous lens</td>
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<td>Using our stories to clear up some common misconceptions</td>
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<tr>
<td>Promoting Indigenous tourism to schools</td>
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<td>Experiential awareness</td>
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<td>Tourist information centres</td>
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<tr>
<td>Signage recognizing the area and its history</td>
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<tr>
<td>Hosting cultural events</td>
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<tr>
<td>Advertising them</td>
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<tr>
<td>Food/food festivals</td>
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<tr>
<td>Recognition of the history by non-Indigenous tourism organizations</td>
<td>✔️</td>
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How can Indigenous tourism in Ontario be used to promote reconciliation?

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</tr>
</thead>
<tbody>
<tr>
<td>Can be a voice for reconciliation, which is embedded in Indigenous tourism – can highlight the commonalities between cultures.</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Demonstrates the authentic culture to promote understanding, respect and awareness</td>
<td>✔️</td>
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<tr>
<td>Offers people a way to live and appreciate our world (e.g. tobacco offerings) – can change behaviors in a positive way</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Attracting local tourists and promoting local awareness</td>
<td>✔️</td>
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<tr>
<td>Sharing stories and history With you and the next generations Breaking any stigmas</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Highlighting success stories</td>
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<tr>
<td>Interpretive interest pieces (e.g. species at risk, flora/fauna, history) – both in English and Ojibway</td>
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<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Funding – MTCS to develop projects and cultural awareness</td>
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<tr>
<td>Elders Ambassadors – sharing, storytelling, circles</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Connecting visitors to some ancient and contemporary ceremonial, transactions and current practices</td>
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<tr>
<td>Schools / education / teachings – curriculum (youth, high school, university)</td>
<td>✔️</td>
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<tr>
<td>Visibility and awareness</td>
<td>✔️</td>
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<tr>
<td>Opportunity to experience</td>
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<tr>
<td>Residential schools – fosters cultural sensitivity, broadens and changes perspectives and re-conceives notions</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Using nature as a healing tool</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Eliminate stigma – creates excitement and interest</td>
<td>✔️</td>
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</tbody>
</table>

Canadian Ecotourism Services (CES)© 2019 Report
Using education (in its more formal sense) to promote understanding
Using stories and cultural teachings to increase awareness
Recognizing and utilizing the foundational aspects of our cultures (i.e. the land, Elders)
Ensuring authenticity
Indigenous tourism product/infrastructure development that educates mainstream tourists
Supporting Indigenous Policies & Protocol
Socio-economic Resource

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<th>Socio-economic Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning/sharing—dispelling myths or misunderstandings</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Provide income</td>
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<tr>
<td>Diversifying the economy—natural resources, tourism</td>
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<tr>
<td>Changing/updating legislation</td>
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<tr>
<td>Protecting areas may be preventing tourism, e.g. “Living Legacy”</td>
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<tr>
<td>Puts emphasis/value on environmental protection and use (sustainability) vs. mining</td>
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<tr>
<td>Education: Sharing stories. Do you really want to know? What are you going to do about it?</td>
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<td>Change and action</td>
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<td>Pride and knowledge + prosperity</td>
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<td>Learning/challenging stereotypes</td>
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<td>Non-academic teaching tools</td>
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<tr>
<td>Real—it’s not history or story book concept</td>
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<td>Offering first hand experience</td>
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<td>Sharing commonalities</td>
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<tr>
<td>Sharing Indigenous values—education</td>
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<tr>
<td>Sharing importance of Indigenous people and culture</td>
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<tr>
<td>Help to understand/learn about history—good and bad</td>
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<td>Build/strengthen relationships</td>
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<td>Meaningful interactions</td>
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<tr>
<td>Provides opportunities for self-sufficiency (economic, cultural, etc.)</td>
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<tr>
<td>Promote healing—centers Indigenous peoples/voices</td>
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<td>Bring resources to communities (not just communities to resources)</td>
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<td>Opportunity for collaboration</td>
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<tbody>
<tr>
<td>Creating a dialogue between Indigenous communities and non-Indigenous tour operators</td>
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<tr>
<td>To understand why there is racism and accepting each other’s differences is not a threat but a strength it is the only way forward</td>
<td>✔️</td>
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<td>Venue for understanding</td>
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<td>Bringing awareness</td>
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<td>✔️</td>
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<tr>
<td>Help people see similarities to promote kindness and understanding</td>
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<td>✔️</td>
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<td>Honesty</td>
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<td>Understanding the severity of the past helps promote a more positive future</td>
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<tr>
<td>Artist culture is a neutral, powerful and engaging way to promote understanding</td>
<td>✔️</td>
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<td>Sharing the positive</td>
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<td>Helps build connection</td>
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<tr>
<td>Helps break down racism</td>
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### Ottawa

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<tbody>
<tr>
<td>Connecting cultures</td>
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<tr>
<td>Shaping education of history</td>
<td>✓</td>
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<tr>
<td>Understanding/respecting culture</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Opening the conversation</td>
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<td>Don't just focus on the 'good stuff'</td>
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<tr>
<td>Raise awareness regarding history of mistreatment/racism/systemic/oppresion</td>
<td>✓</td>
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<tr>
<td>Sensitive to the history of why there are adverse relationships</td>
<td>✓</td>
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<td>Understanding treaty rights, what those mean and what it meant when they were broken</td>
<td>✓</td>
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<tr>
<td>Path to understanding our similarities</td>
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<td>✓</td>
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<tr>
<td>Work together through partnerships in a way that is mutually beneficial</td>
<td>✓</td>
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<tr>
<td>Focus on moving forward in a way that respects the past</td>
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<tr>
<td>Self-education (i.e. attending workshops)</td>
<td>✓</td>
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<tr>
<td>Continued opportunities to engage and learn</td>
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<td>✓</td>
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<tr>
<td>More accessible opportunities to participate</td>
<td>✓</td>
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<tr>
<td>Keeps it top of mind – if tourism experiences are shared, gives it more prominence and creates open minds</td>
<td>✓</td>
<td>✓</td>
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</tr>
</tbody>
</table>

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**Using education (in its more formal sense) to promote understanding**

**Using stories and cultural teachings to increase awareness**

**Recognizing and utilizing the foundational aspects of our cultures (i.e. the land, Elders)**

**Ensuring authenticity**

**Indigenous tourism product/infrastructure development that educates mainstream tourists**

**Supporting Indigenous Policies & Protocol**
Regional Summary

How can Indigenous tourism in Ontario be used to promote reconciliation?

- Using education (in its more formal sense) to promote understanding
- Recognizing and utilizing the foundational aspects of our cultures (i.e. the land, Elders)
- Indigenous tourism product/infrastructure development that educates mainstream tourists
- Using stories and cultural teachings to increase awareness
- Ensuring authenticity
- Supporting Indigenous Policies & Protocol
7.0 Moving Forward

7.1 Primary Research: Summary of Findings

This section is a swift overview of the key findings encountered during all stages of research for this study:

A. Indigenous Tourism Jurisdictional Scan

These findings were gathered based on the characteristics, initiatives and best practices of successful Indigenous tourism associations or organizations in Canada.

A1. An investment in diverse high-quality training and capacity programs, particularly product/experience development and business skills, helps the provincial/territorial Indigenous tourism industry grow.

A2. An emphasis on entrepreneur support and working with individual members has been beneficial for successful Indigenous tourism provinces/territories.

A3. Hosting Indigenous tourism summits, events or conferences contributes to the growth, organization and cohesiveness of a provincial Indigenous tourism association or provincial strategy.

A4. Many provinces/territories in the early stages of Indigenous tourism developing are prioritizing growing Indigenous products.

A5. Many Indigenous tourism associations support the work of Indigenous artists, performers and cultural carriers.

A6. Visiting communities and accessing the industry at a grassroots level has proved to be a successful strategy for many associations.

A7. Multi-year and consistent funding agreements in many cases dictates the success of the association.

A8. Initiating an effective strategy to performance management has helped some organizations.

A9. Sufficient staffing is critical to organizational success.

A10. Key partnerships, particularly the provincial/territorial DMO, all First Nations and support of the provincial/territorial government are determinants of success.

A11. Advocacy, sitting on committees and key industry partnerships are important activities for a provincial association.

A12. A diverse set of organizational marketing tactics helps to promote and grow the provincial/territorial industry.

A13. Many associations in the early stages of development are focused on growing their membership base and providing useful strategic benefits to their members to help grow individual businesses.

A14. With the proper support, Ontario has the opportunity to help ITAC reach its 5-year goals for Market Ready and Export Ready Services based on ITO’s resource inventory alone (i.e. 43% of Ontario’s 66% of Indigenous tourism businesses are Market Ready). With support ITO can assist ITAC in achieving its Export ready goals.

B. Indigenous Tourism Survey

The below findings from the survey are derived from the 3 targeted stakeholders for this research study:

Indigenous Tourism Businesses

B1. Most Indigenous tourism businesses in Ontario are self-employed or community-based enterprises and operate in small rural communities.

B2. The most common Indigenous tourism business-type in Ontario is accommodations.

B3. Indigenous tourism businesses are growing in Ontario, expected common areas of growth include: number of employees, expansion of product offering and an increase in marketing activities.

B4. The primary challenge facing Indigenous tourism businesses is access to funding and lack of financial support.

Indigenous Communities

B5. The vast majority of Indigenous community members feel that tourism would be beneficial for their communities.

B6. The most common tourism asset within Indigenous communities is the natural environment and educational cultural tours or teachings including workshops.

B7. The most common challenges for Indigenous communities in development tourism is funding and financial resources.
Tourism Partners

B8. There is a great interest by tourism partners in working with ITO on joint initiatives; the most common area for potential collaboration is networking and knowledge sharing.

B9. Tourism partners require more communication about ITO’s work and information about partnerships.

B10. Tourism partners value the sharing Indigenous culture and knowledge through awareness and education.

C. Indigenous Tourism Regional Workshops

C1. In order to grow Indigenous tourism at a community level, partnerships and investment are most needed. Additional needs include: community support and awareness, product development, capacity building and marketing and promotion.

C2. The greatest challenge associated with growing Indigenous tourism in Ontario is support and awareness. Additional challenges include: governance and standards, social issues, education and economic assistance.

C3. Ontario’s greatest Indigenous tourism asset is its unique offerings. Additional assets include: the land/environment, traditional knowledge, culture/heritage and the people.

C4. Education is a key component for utilizing tourism to move reconciliation forward; educating visitors and Canadians alike regarding the foundational aspects of Indigenous cultures (i.e. respect for the Land, Elders)

D. Reconciliation Through Indigenous Tourism

D1. The vast majority of individuals consulted with for this research study stated that Indigenous tourism can help with reconciliation.

D2. With an increased interest in Indigenous tourism on a global scale and its potential to grow Ontario’s provincial tourism economy, supporting Indigenous tourism is a beneficial option for both Indigenous and non-Indigenous parties; this can be done in the spirit of reconciliation.

D3. Indigenous tourism should be developed based on Indigenous worldviews and governance including Elders’ contributions and the active participation of youth.

D4. The Ontario Government has vowed to support the strengthening of Indigenous culture and work towards a more equitable relationship in an attempt to address the disparities in socioeconomic status between Indigenous and non-Indigenous people.

D5. To many, reconciliation means acknowledging, learning and educating about Canada’s colonial history in order to understand how past events have shaped our contemporary landscape and our future responsibilities.

D6. Indigenous tourism should be used as a teaching tool to correct misconceptions and transfer knowledge about Indigenous cultures, beliefs and practices.

D7. In order for reconciliation to take place through tourism, experiential cultural learning and interaction with the land needs to be present.
D8. Indigenous tourism can be used to help with reconciliation through by using education to promote understanding. Other ways include: using stories and cultural teachings to increase awareness, recognizing and utilizing the foundation aspects of our cultures, ensuring authenticity, Indigenous tourism product/infrastructure development that educates mainstream tourists and supporting Indigenous policies and protocols.

7.2 Secondary Research: Summary of Findings

E. Environmental Scan

E1. Although globalization allows Indigenous communities and operators to reach new markets, it also leaves them in a vulnerable position due to the volatility of the international tourism market.

E2. Ontario’s economic growth is predicted to slow throughout 2019 and the structure of Ontario’s economy will continue to shift from goods-producing to service-producing sectors.

E3. In an effort to address Ontario’s tourism gap, the province could see an increase in international tourists in the coming years.

E4. Quality mobile experiences, immersive connectivity and machine learning are crucial elements that will influence the growth of Indigenous tourism now and in the future.

E5. Demographical changes such as the growth in Indigenous populations, migration of Indigenous peoples away from their communities and the large youth population amongst Indigenous peoples will have an effect on the future of Indigenous tourism.

F. Indigenous Tourism Key Trends & Industry Research

F1. Indigenous tourism has experienced substantial growth and increased demand and will most likely continue to grow in the coming years.

F2. An increase in grassroots tourism development and cultural planning at the community level has been seen in recent years.

F3. Within digital tourism marketing, there has been a noticeable shift from mass marketing to personalized outreach efforts; relationship marketing is now more important than ever for building long-term engagement and trust with consumers.

F4. China, the world’s number 1 source for outbound travel, is a promising potential market for Ontario, as the Chinese traveller is most interested in visiting Ontario out of all of the Canadian provinces/territories. However recent political tensions and travel advisories will impact China and Canada’s tourism relationship in the coming months.

F5. Millennials continue to make their mark on the travel industry, whose travel interests align with Indigenous tourism’s value proposition.
7.3 Gap Analysis

Throughout this research study, it has become clear that ITO currently lacks the organizational capacity to be able to properly support the existing Indigenous tourism industry which is expanding at an unprecedented rate. Making Indigenous tourism a priority is needed in order to take advantage of potential that this important industry holds, not only for Indigenous communities but for the greater provincial tourism economy as a whole.

ITO lacks the capacity to properly support and grow Indigenous tourism industry due to the following perceived deficiencies:

- Lack of consistent, multi-year operational funding agreements and dedicated budget to supporting Indigenous tourism
- Lack of human resource capacity (due to a limited budget); to service and support more than 1/3 of Canada Indigenous tourism industry
- Lack of resources to properly support product development initiatives, such as the OAIM program
- Lack of resources to develop and execute training and capacity building programs throughout the province
- Lack of resources to conduct visits to communities in order to facilitate and support growth amongst grassroots tourism projects
- Lack of resources to properly promote and market Ontario’s Indigenous tourism products
- Lack of strategic partnerships roles with key tourism organizations, industry and government to support ITO strategic objectives
- Lack of resources to provide ongoing support to aspiring or existing Indigenous tourism businesses leading to export readiness
### 7.4 Key Recommendations for ITO Moving Forward

<table>
<thead>
<tr>
<th>Operational</th>
<th>Partnerships</th>
<th>Product Development &amp; Capacity Building</th>
<th>Using Tourism as a Tool for Reconciliation</th>
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</thead>
<tbody>
<tr>
<td>It is recommended that ITO follow their 2020 Strategic Plan and execute their 2018/19 Critical Path to ensure goals and measurable results are achieved, noting the staffing issue as a critical deficiency.</td>
<td>It is recommended that ITO work with organizations such as TIAO, Destination Ontario and ITAC to strengthen Ontario’s Indigenous tourism product and brand offering.</td>
<td>Provide regional and local support and mechanisms to encourage grassroots tourism development through awareness campaigns in communities.</td>
<td>Tourism development should take into account social issues and community challenges before recommending general tourism development approaches. Community assessments should be conducted to identify social challenges as obstacles to developing tourism.</td>
</tr>
<tr>
<td>Work with the ITO Board, Ministry of Tourism Culture and Sport and ITAC to provide support for ITO’s Critical Path and 2020 Strategic Plan.</td>
<td>ITO to organize an Indigenous Tourism Ontario Partners Summit via a strategic planning session to align and develop support, opportunities, strategic gap solutions, and key performance indicators for growing Ontario’s Indigenous tourism industry.</td>
<td>Build programs that support cultural entrepreneurs, knowledge keepers and language holders.</td>
<td>Work with provincial educational bodies to integrate special programming and protocols that respect the territories and provide insight into the historic and present day efforts of Indigenous history and culture. Integrate programming with a two prong approach - understanding and acceptance, and increasing tourism programming through delivery of authentic tourism experiences that share rich culture and history in our own back yard.</td>
</tr>
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<td>ITO’s membership structure, process and protocol should mimic that of Indigenous tourism associations’ best practices.</td>
<td>ITO needs to align its strategic objectives and KPIs to work in harmony with partnering organizations’ strategies and priorities, enabling ITO to reach mutual goals in supporting and growing Ontario’s provincial tourism aspirations.</td>
<td>Capitalize on Ontario’s key Indigenous tourism assets: the people and culture, the land, traditional knowledge, and unique offerings.</td>
<td>Support and promote province-wide workshops that share the history of the territory they reside on. Consider corporate sponsorship and partners whose social responsibility is in line with ITO.</td>
</tr>
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<td>Provide mechanisms and a single window initiative that can be easily navigated, while providing funding specific to Indigenous cultural tourism development.</td>
<td>Utilize partnerships for developing and producing tourism businesses such as, market ready/export ready product development, marketing strategies and insights, and work with both levels of Government with partners to increase Ontario’s visitor ship and economic position.</td>
<td>Work in partnership with Indigenous tourism businesses and communities to assist in developing tourism business products and services in 5 areas: conceptual planning; doors open (organic development); visitor ready (including OAIM-Model); market ready; and export ready.</td>
<td>Lobby organizations in Ontario to acknowledge traditional territory and treaty rights. Traditional territory acknowledgements should be initiated in schools, at events, and by the Regional Tourism Associations in their marketing pieces.</td>
</tr>
<tr>
<td>ITO should align with partners such as ITAC to ensure that research insights and trends remain current. Research and findings should be pooled and shared to eliminate duplication and provide more targeted funding requests. i.e. calculation on the collected taxes for Indigenous tourism</td>
<td>Work with the Ministry of Tourism Culture and Sport to support Indigenous entrepreneurial efforts, supporting a visitor first approach, facilitating and incubating key partnerships with industry and government, while supporting key research efforts into the insights and needs to positively position Indigenous tourism in Ontario.</td>
<td>Initiate training programs for Indigenous entrepreneurs and communities in areas of high need such as experience development and business skills. Conduct workshops and programs within the communities.</td>
<td>Promote and support a program and marketing campaign that ‘tells the story’, highlighting and promoting the efforts of cultural entrepreneurs that have used Indigenous tourism for reconciliation and understanding.</td>
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<td>Complete a study on Ontario’s GDP to ensure non-Indigenous tourism organizations are allocating a dedicated percentage to support Indigenous businesses.</td>
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<td>Work with ITAC to initiate a national knowledge sharing network whereby the leaders of Indigenous tourism associations collaborate to give advice and share experiences, successes, and challenges relating to their organizations in order to strengthen the Indigenous tourism industry across Canada.</td>
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