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ATLANTIC CANADA INDIGENOUS TOURISM STUDY

Joint Economic Development Initiative

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Acknowledgement

We would like to acknowledge with much appreciation the crucial role of the Joint Economic Development Initiative for leading this project and the Project Steering Committee, who provided their knowledge and expertise on guiding the development of the Atlantic Canada Indigenous Tourism Study.

Executive Summary

This study provides and opportunities analysis of Indigenous tourism in Atlantic Canada that identifies economic opportunities and needs in the sector for First Nations and Inuit communities in the region. This report includes priority opportunities, industry needs and barriers, and available economic development supports for Atlantic Canada First Nations and Inuit communities seeking to enter or expand in the Indigenous tourism sector.

In order to effectively provide a meaningful and relevant document, the study included research of existing materials and engagement with a wide range of stakeholders to allow careful analysis to be completed resulting in recommendations and identified priorities for the region, for each of the Atlantic provinces and for both community-owned and entrepreneur-owned Indigenous tourism businesses.

All the sections of the full report are summarized here to provide a condensed overview of the research, analysis, engagement completed in the study and the resulting full list of recommendations created to address the study findings.

Tourism Market Analysis

To develop and share an understanding of the Indigenous tourism market, this report completed a current and future market analysis of the tourism sector and Indigenous tourism in Atlantic Canada presented as a region and by province.

This report requires comprehensive industry research and analysis to provide valid data, context, comparable examples, best practices, understanding and awareness. For research to effectively direct decisions and future action of this report, the information was collected in a thorough, strategic and effective way from trusted and relevant sources.

Atlantic Region

The Atlantic region successfully attracts visitation from across Canada, the United States and from overseas. Tourism is estimated to contribute more than $5 billion annually to the Atlantic Canadian economy. In Atlantic Canada, tourism supports 9,800 regional businesses, employs 62,900 Atlantic Canadians and contributes nearly $5 billion annually to Atlantic Canada's Gross Domestic Product (GDP).

Research demonstrates that Atlantic Canada represents slightly over 9% of the national total of 1,875 Indigenous businesses. Atlantic Canada has the highest proportion of Indigenous tourism businesses in the Arts & Heritage sector. Atlantic Canada has just five businesses (or under 3% of the total) that are Recreation and Outdoor Adventure whereas in Canada this sector of Indigenous tourism represents over 13% of all businesses. Accommodations in Atlantic Canada also represent a smaller percentage of the overall businesses (11%) as compared to Canada (18%).

The economic impact of Indigenous tourism in Atlantic Canada includes almost 2,900 jobs representing almost $76 million in labour income from Indigenous tourism. These jobs produce $108 million in GDP for the Atlantic region and generate over $225 million in revenues. GDP generated by Indigenous tourism in Atlantic Canada in 2018 represented 5% of the Atlantic region’s overall tourism GDP based on 2018 Statistics Canada data.

Research shows that most travelers commit to an Indigenous experience after they have arrived at their destination. For most travelers, engagement in Indigenous tourism experiences is a much valued 'add-on' that arises as an unanticipated side benefit in a broader purposed trip.

Indigenous tourism businesses will have an opportunity to thrive in the new world of tourism in 2021 (post COVID-19) as it is expected that many travellers will be looking for meaningful, custom experiences that help them feel transformed and, to a certain extent, healed from the experiences of the first half of 2020. Indigenous cultural tourism offerings are in a very strong position to offer a special experience all the more relevant and deeply meaningful to visitors.

The domestic 'drive-market' tourists are expected to return first to travel and Indigenous businesses should look to promote their offerings through communication channels specifically successful with the domestic and regional traveller.

New Brunswick

Tourism is one of New Brunswick's most important industries and in November 2017, the government of New Brunswick announced the New Brunswick Tourism Growth Strategy: New Tourism Economy. Tourism has been identified as a key opportunity for growth in the New Brunswick Economic Growth Plan. Indigenous tourism in New Brunswick attracted just over $71 million in revenues in 2018, second only to Newfound & Labrador in Atlantic Canada. The Indigenous tourism industry in the province employs 829 people earning $16.5 million in wages and contributing $24.3 million in GDP for the province. According to the Conference Board of Canada, between 2014 and 2018, the number of Indigenous tourism businesses increased by 9% from 47 businesses in 2014 to 51 businesses in 2018. New Brunswick's 51 Indigenous-owned tourism businesses in the province are second to only Newfoundland & Labrador.

The Indigenous Tourism Association of New Brunswick (ITANB) launched their organization in 2018. They are a non-profit, stakeholder-based organization and the province's first and only dedicated Indigenous tourism organization. Through product development and marketing of authentic Indigenous experiences, ITANB is working to create a platform for Indigenous cultural expression and preservation through tourism.

The province is expected to feel the longer-term effects of a struggling cruise industry. For 2020, Port Saint John reported that they expected a best-ever cruise season in 2020 and was on track to break the 200,000-passenger record set in 2010. Each year, prior to COVID-19, the province welcomed more than 240,000 cruise guests (passengers and crew) which represents an annual $49.9 million boost to New Brunswick's economy.

Newfoundland & Labrador

This province has 2,700 tourism-related businesses, 20,000 provincial jobs in tourism industries, over 550,000 annual visitors and $1.13 billion in annual tourism spending. The Economic Growth Strategy for NL identifies tourism as one of the priority sectors with the potential to significantly impact NL's economy. ITAC research in 2018 indicates that Indigenous tourism employs over 1,000 people in Newfoundland and Labrador earning over $33 million in wages and salaries and adding $47.6 million to the provincial GDP. NL is the highest province in Atlantic Canada in terms of Indigenous tourism jobs, labour income, GDP and industry revenues.

The Indigenous tourism supply is growing in NL; between 2014 and 2018, the number of Indigenous tourism businesses increased by 71%. NL's Indigenous tourism industry brings in $95.2 million in revenues with 72 Indigenous tourism operators, also the highest of any of the Atlantic provinces. NL's

Indigenous tourism businesses are primarily Arts & Heritage (29% of businesses) and Accommodation (26%) with just two businesses in the Recreation and Outdoor Adventure category.

In 2019, the Newfoundland & Labrador Indigenous Tourism Association (NLITA) was launched. NLITA is an Indigenous-led group looking to maximize Indigenous tourism potential in NL. According to NLITA, it is designed to support its industry members through "strong regional, provincial, and national partnerships to provide meaningful benefits for the Indigenous communities across the province."

The province will feel the longer-term effects of a struggling cruise industry and an expected steep drop in international arrivals. Businesses will need to adjust their target audience for visitors in the absence of cruise passengers and overseas guests in 2020 and reduction in volumes in 2021 and beyond. Partnerships with HNL, Tourism NL and ITANL and its new strategy will help direct, support and guide Indigenous tourism operators in this challenging future ahead.

Nova Scotia

In 2018, Nova Scotia tourism revenues reached $2.8 billion, the highest of any of the Atlantic provinces. Nova Scotia also leads the region in attracting 2.4 million visitors in 2018 and 2.8 million room nights sold out of a total of 5 million room nights available resulting in a 55% average accommodations occupancy level.

Indigenous tourism in 2018 in Nova Scotia attracted $51.4 million in revenues and represented 876 jobs, $23 million in labour income and $31.6 million in provincial GDP. Between 2014 and 2018, the number of Indigenous tourism businesses decreased by 24% from 38 businesses in 2014 to 29 businesses in 2018. Almost half of the 29 Indigenous tourism businesses in 2018 were in the Arts & Heritage sector of tourism. The second highest sector of Indigenous tourism businesses in the province is Travel Services which includes retail and gas stations with 26% of the total businesses. Nova Scotia has a very limited number of Indigenous-owned outdoor adventure businesses and a limited number of Indigenous-owned accommodation providers and food and beverage businesses.

The Nova Scotia Indigenous Tourism Enterprise Network (NSITEN) was formed in 2017 as a volunteer based, not-for-profit cultural tourism organization that develops specific project-based training aimed at growing the capacity of Indigenous individuals, businesses and community lead tourism initiatives. NSITEN is a member-based organization and their voting members are made up of new and existing Indigenous artists, crafters, traditional knowledge keepers and band enterprises. Membership criteria includes having a valid Indian Status Card as recognized by the national Indigenous organizations of Canada.

Nova Scotia appears to have significant upside potential for growth as it has the largest revenues in the overall tourism sector in the Atlantic Region. However, Nova Scotia falls behind both New Brunswick and Newfoundland & Labrador in terms of number of Indigenous tourism businesses and revenues. Nova Scotia has significant upside potential to grow the volume of Indigenous tourism businesses within this province that receives higher overall tourism volumes than the other provinces in the region.

Prince Edward Island

With an estimated 1.58 million visitors, 2018 marked the fifth consecutive record year for tourism on the Island. Tourism revenue grew an impressive 5.7% to $486 million in 2018 with over 320 new licensed accommodation providers entering the market in 2018. Tourism PEI reported that of the 1.01 million overnight visitors in PEI in 2018, just over 900,000 of them were from within Canada (89%).

The province averaged $480 in total tourism spending in the province per overnight visitor in 2018 which is over four times higher than Nova Scotia at $109 and over twice as high as Newfoundland and Labrador at $211.

The Indigenous tourism supply is growing in PEI. Between 2014 and 2018, the number of Indigenous tourism businesses increased by 82% from just 11 businesses in 2014 to 20 businesses in 2018. Indigenous tourism businesses attracted $7.2 million in revenues to the province and provided almost 190 jobs and $2.8 million in labour income leading to $4.2 million in GDP. Of all the Atlantic provinces, PEI has the lowest revenues earned per job in the Indigenous tourism sector. PEI receives almost twice the number of tourism visitors each year as compared to Newfoundland & Labrador but falls behind NL in terms of Indigenous tourism revenues and average earnings per business. PEI has very few Indigenous-owned tourism businesses in the accommodations, food and beverage and recreation sectors

On a very positive note for the province, when analyzing size of the industry as compared to the size of the Indigenous population, PEI, the smallest province in Atlantic Canada in both size and Indigenous population, has the highest number in the region provinces of jobs (68), businesses (7) and revenue ($2.63 million) per 1,000 of Indigenous population in the province.

In January 2020, Tourism PEI announced that they had begun the process of developing a new five-year tourism strategy for the province. The strategy can incorporate a COVID-19 recovery as well as steps to return to the successes of 2015-2019 while adjusting to new realities like reduced cruise traffic, reduced international and long-haul travel and reduced activities involving large crowds or crowded areas.

Impacts of COVID-19

Canada's tourism sector has been deeply impacted by the spread of COVID-19 around the world. Canada has done an effective job containing the spread of the virus by putting travel restrictions in place as well as various health and safety measure, this has resulted in a dramatic decease in the number of international visitors coming to Canada.

National Impact

Destination Canada provided estimates in the change in tourism export revenue compared to 2019 stats by province in their COVID_19 Impact and Recovery Report: International Summary (Updated: July 28, 2020). There has been an estimated $12.2B lost in tourism export revenue lost across Canada from January to September as compared to the same period in 2019. Destination Canada has produced a comparison of total international arrivals to Canada. From March to May 2020, there were 88.6% fewer international arrivals to Canada (representing approx. 3.9M fewer total visitors over those three months). Tourism revenues are expected to fall approximately 43%-61% in 2020 in comparison to 2019.

Tourism employment has also significantly decreased due to the delay in starting the season, significantly reduced consumer demand and/or permanent shut down of businesses. Employment in tourism was down by 668,300 jobs in June compared to one year prior.

Destination Canada has developed a phased approach to tourism industry recovery. The approach is based on the need to understand the resiliency and sustainability of the sector across economic, social, cultural, and environmental factors.

Destination Canada's updated Visitor Demand Forecast (July 2020 Update) provided updated estimates for recovery to 2019 levels. The forecast was driven by three key areas of uncertainty: health restrictions, economic conditions, and consumer sentiment. Overall, it is expected that tourism will recover to 2019 levels by 2023 or 2024 depending on timing of Canada's borders reopening to visitors.

National Impact on Indigenous Tourism

The effects of COVID-19 on Indigenous tourism businesses in Canada have been very significant as many communities had restricted visitors from coming to their community. By restricting visitors, Indigenous communities are able to better prevent the spread and keep community members safe.

Employment and GDP for Indigenous tourism in 2020 is expected to be almost two-thirds less than in 2019 with an expectation to recover and grow beyond 2019 results by 2024. Based on an ITAC 2020 survey, respondents indicated that they expected to lose an average of 60% of their expected revenue in 2020 across all industry domains. Indigenous tourism businesses in the transportation (non-air), and travel services-retail are expecting to be the hardest hit.

Across all industry domains, Indigenous operators felt that there was a 40% change that their business would close permanently in 2020 or 2021, the industry domains most concerned about the possibility of permanent closure was in air transportation, and other forms of transportation. Respondents expected employment losses over 50% due to COVID-19. The highest levels of employment losses were expected in the sectors of food & beverage, recreation & outdoor activities, and accommodations.

In response to COVID-19 ITAC has developed a strategic recovery plan for the Indigenous tourism association that includes three strategic priorities for recovery:

1. Ensuring the sustainability of ITAC member businesses across the country.
2. Ensuring the sustainability of the provincial and territorial Indigenous tourism associations.
3. Ensuring the sustainability of ITAC's national operations.

ITAC's strategic recovery plan aims to align with the recommendations of the United Nations World Tourism Organizations and Destination Canada's COVID-19 plan.

Atlantic Region

Atlantic Canada's tourism industry has been heavily impacted and due to COVID-19 there will be significant recovery time that will impact the industry's GDP, employment, and number of visitors to the region. Destination Canada estimated $800.9M in tourism export revenues lost in the Atlantic Canadian provinces from January to September as compared to the same period in 2019.

According to a recent report from the Atlantic Provinces Economic Council on COVID-19's key issues for Atlantic Canada, the Atlantic region is recovering faster than nationally due to its success in largely eliminating the virus within the four provinces by creating "Atlantic Bubble" for residents of the four Atlantic Provinces (New Brunswick, Newfoundland and Labrador, Nova Scotia, and Prince Edward Island) to be able to travel within Atlantic Canada without being required to self-isolate. The Atlantic Bubble started on July 3, 2020. Visitors from the outside the region, but still from Canada, are required to follow the local entry requirements in place in each province, which may include 14-day isolation.

New Brunswick

Due to COVID-19 impacts, 70% of tourism businesses in New Brunswick were closing temporarily, and that 57% of business were considering temporary closure and 22% of responding businesses feel they are at risk of closing permanently within the next three months. New Brunswick has seen an estimated $210.9M loss in tourism export revenue over a 9-month period. This is an 85% reduction in revenues compared to 2019.

Industry research in the province indicates that 38% of tourism businesses indicated that they had laid off staff and 24% had deduced their staff hours; 54% of operators indicated that they would have to lay off employees, and that 49% would be unable to pay staff wages. Tourism HR Canada reports that the largest drop in tourism jobs was in April for New Brunswick.

New Brunswick is currently in the Yellow Phase (phase 3 of 4 towards full reopening of the province), in this phase some facilities have started to reopen and travel within the province and Atlantic Bubble are permitted Visitor information centers remain closed as of mid-August 2020 and no reopening date has been establish. Intra-Provincial travel searched are above 2019 levels as more residence are travelling within the Atlantic Bubble. Online surveys conducted by Tourism New Brunswick indicated that 66% of New Brunswick residents said their overnight travel plans were affected by COVID-19, but 81% indicated that they are likely to Travel within New Brunswick in summer and fall of 2020.

Tourism New Brunswick has shifted marketing focus to staycations, with most businesses following this marketing strategy to promote local travel, as well as focusing marketing efforts on communicating COVID-19 safety protocols to prospective visitors.

Newfoundland & Labrador

The remote province of Newfoundland and Labrador has been particularly hard hit; as an example, the two largest airports in this province were down 95% or more in number of passengers in April 2020 as compared to April 2019. In the restaurants and bars sector, Statistics Canada indicates that in Newfoundland & Labrador in April 2020 there was a 58% reduction in spending at these establishments as compared to April 2019. Newfoundland & Labrador has seen an estimated $83.5M loss in tourism export revenue over a 9-month period. This is a 80% reduction in revenues compared to 2019.

Tourism employment in 2020 shows a 30% drop in employment in April 2020 as compared to April 2019. July would typically see over 30,000 tourism jobs however in 2020 the employment for July was well under 25,000.

In May, the province of Newfoundland & Labrador announced $25 million in provincial money to support the tourism industry, with small and medium-sized businesses eligible for a $5,000 or $10,000 non-repayable contribution, depending on their size. Steve Denty, the Chair of Hospitality Newfoundland & Labrador, indicated to CBC.ca that their organization's short-term plan includes promoting tourism inside the province before anything else.

Nova Scotia

Nova Scotia saw the largest negative change in tourism export revenue among the Atlantic Provinces. Accommodation operators in the province reported a 31% decrease in room nights from January 1 to April 30, 2020 as compared to the same period the year prior. Nova Scotia has seen an estimated $377.4M loss in tourism export revenue over a 9-month period as compared to the same time period in 2019. This is an 87% reduction in revenue compared to 2019. Tourism employment showing the largest drop in tourism jobs in April 2020 with an almost 50% drop as compared to April 2018 however there was a monthly increase in employment from April to July 2020.

Nova Scotia's reopening plan commenced on June 15, 2020. Starting with the Atlantic Bubble on July 3, 2020, residents of the Atlantic provinces are able to travel within the Atlantic Region without a required 14-day self-isolation.

Tourism Nova Scotia has focused on six strategic marketing approaches within the province:

1. "Stay Home" - to encourage travellers to stay home and stay safe until conditions improve.

2. “Nova Scotia – Still Together” Video and hashtag #WaitToVisitNovaScotia - to share Nova Scotia's spirit of community and support for one another while staying home and staying safe.
3. Rediscover Nova Scotia Campaign (late June/early July) - to give Nova Scotians compelling reasons to start travelling within the province again. #RediscoverNovaScotia
4. We’re Open (Maritime Campaign Part 1) and Do More (Maritime Campaign Part 2) - to give Atlantic Canadians compelling reasons to start travelling to Nova Scotia again.
5. TNS Target Markets (Timing TBD) - to let our target markets know they are open for business and looking forward to seeing them.
6. Nova Scotia Confidence Campaign (Timing TBD) - to continue to foster support, pride and confidence in the provincial tourism industry.

Prince Edward Island

Prince Edward Island’s is expected to lose 85% of its tourism businesses has seen an estimated $129.1M loss in tourism export revenue over a 9 month period. This is an 85% drop compared to 2019. In the early stages of the global pandemic transportation to the island was reduced to allowing only residents of the island into the province which significantly impacted tourism in the province but has had a direct impact in reducing the spread of the virus in the province.

Tourism employment saw the largest drop in tourism jobs in April. There is an increase in employment each month after April with a steep increase in June, but employment is still significantly lower compared to 2019 employment. In April CBC News reported that the PEI Government was preparing for 20,000 in job losses, of this an estimated 5,300 would be related to accommodations and food services, 3,400 to retail trade, and 1,600 to arts, entertainment, and recreation.

PEI COVID-19 Recovery Plan consists of four phases, with PEI currently in Phase 4. Currently PEI is in the Atlantic Bubble, this program allows visitors to the island, but they must complete a self-declaration form if they are not permanent residents of Atlantic Canada. Additional services have also begun to open in late June including campgrounds, inns, and B&Bs. The Charlottetown airport has also resumed operations but offers limited flights.

Best Practices

This pace of growth and the level of economic activity derived from Indigenous tourism is not consistent across Canada. The Best Practices section of this study examines Canadian provinces where the Indigenous tourism sector is considered more established and reports on the tourism economy of those provinces/territories and the efforts they have used to be successful in order to consider methods to replicate this success in the Atlantic provinces.

To assist with identifying best practices for the Atlantic provinces to use for guidance in moving forward with their efforts to grow Indigenous tourism, this analysis identifies provinces with established Indigenous tourism industries using two primary variables:

1. Number of market-ready Indigenous tourism businesses which shows the level of established product available and size of industry – minimum of 200 identified businesses
2. Existence of an active Indigenous tourism association with a primary objective to support and grow Indigenous-owned tourism-related businesses – minimum of 20 years as an active organization.

When combining the two variables above, British Columbia and Québec are listed in both categories and were used in this study as the primary focus of best practices review. The other two provinces that appear in one of the variables above, Ontario and Yukon, were also used for additional analysis to determine additional best practices relating to their success in establishing Indigenous tourism in the province or territory.

Indigenous tourism organizations reviewed for best practices:

British Columbia – Indigenous Tourism Association of BC (ITBC)
Quebec – Quebec Aboriginal Tourism (QAT)
Yukon – Yukon First Nation Culture and Tourism (YFNCT)
Ontario – Indigenous Tourism Ontario (ITO)

The most successful provinces or territories in Canada have an Indigenous tourism organization helping to sustainably grow the industry with authentic, in-demand experiences and strong marketplace awareness. These organizations show these consistent best practices:

1. Extensive marketing programs and activities in partnership with destination marketing organizations to a) guide and support Indigenous businesses in their marketing efforts and b) provide direct to consumer and travel trade promotions and awareness on behalf of market and export ready businesses.
2. Clear priority for business/product development to reflect marketplace gaps, consumer demands and ability to offer market-ready experiences to consumers; particular attention is focused on establishing or strengthening market or export readiness for eligible businesses.
3. Close, established relationships with funding partners through a mutually beneficial partnership to build financial stability and sustainability.
4. Active leadership and advocacy for Indigenous tourism to build awareness, respect, opportunity for collaboration, strategic alignment and support.
5. Effective strategic planning process to build and grow an Indigenous tourism organization through engagement, research, funding partnerships and effective organizational governance and operations.
6. Measurable goals and timelines demonstrating specific targets to achieve through the strategic plan and programs.
7. Close partnership with industry organizations with aligned strategies and overlapping mandates.
8. Established and operating membership (or stakeholder) program that maximizes participation through a) low cost of membership, b) relevant, useful benefits and c) active communication and coordination with members on a regular consistent basis.
9. Visible activity in the mainstream tourism and corporate environment through hosting of events, participation on committees and attendance at industry conferences and marketplaces/ tradeshows to build awareness and understanding of the organization and identify partnerships and collaborations.
10. Regional approach to business and community support to adapt to regional differences and issues through region-specific programs and regional coordinators.
11. Adaptability to changes in the political or economic environment to allow the organization to survive changes or threats out of the control of the organization; typically this is achieved with a diverse funding and partnership base and the ability to scale the organization based on available funding and support.
12. Successful self-earned revenue streams to help offset project costs or to expand projects (i.e.: events, membership, marketing collateral, direct-to-consumer sales channels) however these revenue streams do not show a net profit to assist with other projects or the overall organizational bottom line.
13. Collaboration with Indigenous community leadership (i.e.: BC and Yukon in particular show specific effort to collaborate); demonstrating understanding that support from community leadership is critical in being able to achieve and sustain success and also to benefit from the existing economic development support programs and administrative systems available to community-owned businesses.

Industry Engagement

The Indigenous tourism marketplace analysis has determined that Indigenous tourism in Atlantic Canada has demand and opportunity for growth however there needs to be a better understanding of a) the barriers that Indigenous tourism experiences in the region, b) the supports needed to work towards overcoming those barriers from the perspective of the businesses and suppliers/operators themselves and c) the supports available from the tourism industry and Indigenous support organizations.

Overall, the industry engagement objective for this project is to identify potential gaps that exist between business support needs and support organization offerings. From the engagement results, priority efforts and adjustments to current efforts can be recommended.

In this project there are two primary groups for targeted engagement. Each group has specific goals to achieve within the engagement process.

1. SUPPLIERS

Including Indigenous entrepreneurs, business operators, tourism experience suppliers and business managers. This group also included Indigenous community representatives involved with community economic development and community capacity development.

2. SUPPORTERS

Including Provincial and Federal representatives operating in economic development policy and programming related to Indigenous and non-Indigenous tourism and economic development. This group also included Indigenous and non-Indigenous national, provincial, and regional tourism associations and industry representative organizations active in Atlantic Canada.

The approach of this portion of the project was a five-step process to collect and organize the collection of relevant and useful data and information:

1. Build contact database
2. Create engagement/interview questions
3. Initiate contact
4. Gather survey/interview responses
5. Create database to organize responses

The data was collected and organized to allow this report to summarize the data to identify themes and trends relevant to the overall objective of the project.

The summary of the data collected provides an understanding of a) who are the respondents and their key characteristics and b) what are their viewpoints and opinions on priority issues within Indigenous tourism in Atlantic Canada.

The database of contacts totalled 424; in total there were 81 survey responses which calculates to a 19% overall response rate. The reporting of survey results is divided into two sections: 1) Indigenous Tourism Operators & Indigenous Community Leadership (referred to in this report as “Suppliers”) and 2) Indigenous Tourism Supporting Organizations (referred to in this report as “Supporters”).

The Suppliers group provided 48 of the 81 overall responses representing slightly under 60% of all responses.

Province or Region	# of responses	% of total responses (from Supplier Businesses)
New Brunswick	11	23%
Newfoundland & Labrador	23	48%
Nova Scotia	11	23%
Prince Edward Island	3	6%

A significant majority (73%) of Supplier respondents represent an Indigenous-owned business as compared to 27% who represent an Indigenous community or Indigenous person interested in tourism. In addition, 71% of the supplier respondents represent entrepreneur-owned businesses as compared to 29% who represent community-owned tourism businesses. 80% of the respondents represent for-profit businesses and the remaining 20% of supplier respondents are established as not-for-profit corporations with 7% not yet operating a business. The report also details the market-readiness, size of the businesses, their profitability, types of products/experiences they offer and the key types of partnerships they have as well as partnerships they wish to establish or expand.

The suppliers were also asked what types of support they have accessed and the types of support they need. The data collected indicates that the top four priority supports needed for suppliers to improve or expand their business are:

1. Access to financing, capital, grant funding – 18% of respondents
2. Marketing with a DMO – 15% of respondents
3. Business development programs – 13% of respondents
4. Business partnerships and collaboration – 10% of respondents

Suppliers were asked their perception of the priority opportunities for Indigenous tourism in Atlantic Canada. The top response with 17% of the responses is "product and business development" with "marketing to increase marketplace demand" a close second at 15%. These two themes are very business-focused typically leading directly to increased business volume for the businesses.

The top two priority challenges for Indigenous tourism growth in Atlantic Canada as perceived by the supplier respondents are "limited partner support (funding, relationships, advocacy)" at 18% and at 15% "Low number of market/export-ready Indigenous tourism product".

The top four priorities according to Supplier respondents to help create or grow an Indigenous tourism association in their province are:

1. Partnership with the tourism industry – 22%
2. Relationship with Indigenous businesses and entrepreneurs – 16%
3. Understand opportunities and challenges of Indigenous tourism – 15%
4. Deliver support projects and programs for Indigenous tourism – 15%

The Supporters engagement group (supporting organizations) provided 33 of the 81 overall responses representing slightly over 40% of all responses.

Province or Region	**# of responses**	**% of total responses (from Support Organizations)**
New Brunswick	7	21%
Newfoundland & Labrador	7	21%
Nova Scotia	9	27%
Prince Edward Island	6	18%
Atlantic Canada*	4	12%
*These responses received from organizations who represent the region rather than one province.		

Relating to the types of primary clients the respondents support, 41% of the respondents are supporting "tourism businesses & organizations", 34% are supporting "Indigenous-owned businesses & organizations" and 16% are primarily supporting all types of businesses & organizations.

The most common type of support offered is "product development training" and is also the category receiving the most responses from supporting organizations in terms of their perception of types of support needed. Similarly, "marketing support and training" was the second-most frequently offered type of support offered and is also the category receiving the second-most responses from supporting organizations in terms of types of support needed.

Relating to key opportunities to grow Indigenous tourism, the top response at 30% is “product development” with “marketing” being the second most frequent response at 14%. This suggests a perception from the supporting organizations that product development is needed to alleviate the challenge of limited available experiences for consumers, and is a significant opportunity as compared to the rest of the listed opportunities. In terms of key challenges to address to grow Indigenous tourism, the top two challenges identified were “low number of market/export-ready product” at 20% and at 16% operators “struggling with market/export readiness”.

Supporting organizations were also asked their perception of the types of tourism product development that should be prioritized in Atlantic Canada. Their responses showed that 24% recommended “outdoors & adventure” as the top tourism industry category for future Indigenous tourism development in the region. The second-most frequently recommended development category was “tours and related services” which includes cultural sharing workshops, tour operators, and travel agencies

Supporting organizations recommended these two types of partnerships for Indigenous tourism businesses:

1. Tourism marketing organizations – 32%
2. Training and development partners – 32%

The findings from the engagement stage of this study were combined with the research results to identify gaps in the business support needs and the supports offered by organizations.

Gap Analysis

Overall, the objective of a gap analysis for this report is to identify gaps that exist within the Indigenous tourism industry in Atlantic Canada when comparing the market opportunity and supplier support needs to the current product availability in the marketplace and the current economic development programming and funding in Atlantic Canada available to First Nations and Inuit-led Indigenous tourism initiatives.

Market Demand Opportunity

From the Tourism Market Analysis section of this report, it is demonstrated that tourism is a key industry and of strategic importance for Canada’s Atlantic region. Market research indicates a strong interest from visitors to the Atlantic region for cultural experiences, festivals, events, culinary, local authentic tourism experiences, and art/artisans. This type of demand can be directly satisfied with authentic Indigenous tourism experiences.

The market opportunity for Indigenous tourism in Atlantic Canada is centered on five themes:

1. Indigenous tourism has seen strong steady growth over the past decade
2. Cultural content and authentic sharing allow Indigenous tourism to stand-out in the marketplace
3. Indigenous tourism has consistently been booked late in the path to purchase for consumers
4. There is strong demand for Indigenous tourism from the international marketplace
5. Tourism will rebound from COVID-19 and Indigenous tourism will be in a strong position to offer meaningful experiences in response to shifts in the marketplace.

Indigenous Tourism Supply

Atlantic Canada represents just over 9% of the national total of 1,875 Indigenous tourism businesses as of 2018. Newfoundland and Labrador have the highest number of overall businesses and PEI with the fewest businesses.

The highest proportion of Indigenous tourism businesses in Atlantic Canada is in the Arts & Heritage sector which is consistent with the overall Canadian numbers. Atlantic Canada has just five businesses (or under 3% of the total) that are Recreation and Outdoor Adventure whereas in Canada this sector of Indigenous tourism represents over 13% of all businesses. Accommodations in Atlantic Canada also represent a smaller percentage of the overall businesses (11%) as compared to Canada (18%).

The status of the Indigenous tourism supply in Atlantic Canada is centered on four themes:

1. Atlantic Canada has a small number of authentic Indigenous tourism businesses in comparison to the overall size of the industry and only a small percentage of the businesses are at a medium to high level of business readiness.
2. Most of the Indigenous tourism businesses in the Atlantic region centered around arts & heritage and retail offerings along with gaming and food & beverage businesses. In comparison to Canada, the region has relatively few accommodation and outdoor adventure products.
3. Most Indigenous tourism businesses tend to be small enterprises that are entrepreneur-owned (non-community owned).
4. Tourism industry representatives in the region recommend product development expansion and investment should be centered around outdoor & adventure experiences, tours and accommodations.

Supports Needed

Tourism industry operators or suppliers have access to many forms of support, guidance, and assistance.

Access to financing is the top support already being accessed and is also the top support needed. The industry engagement also discovered that both the suppliers and supporters of Indigenous tourism agree that support is required to assist with two key challenges:

1. Low number of market/export-ready Indigenous tourism products
2. Supplier challenges with achieving or maintaining market/export-ready business practices

An analysis of supports needed by Atlantic Indigenous tourism suppliers reveals four themes:

1. Most suppliers of Indigenous tourism in Atlantic Canada receive support centered around three main components: a) financing, b) business development & training and c) Marketing
2. Suppliers are looking for more support to improve their business in those three components listed above however also seek additional support with business partnerships which is not a form of support currently offered by existing industry support organizations surveyed.
3. Access to financing is listed frequently as an industry challenge and support that is required. Businesses also list financing as the most common form of support they already receive. More investigation is required to determine a) improvements needed for methods of access, b) the types of financing needed and b) the potential unintentional development of a grant funding overdependency in the Indigenous tourism industry.
4. Both Indigenous tourism suppliers and supporters agree that support is required for product development of Indigenous experiences at a market/export-ready level, businesses are challenged with meeting or sustaining these industry-based levels that reflect consumer expectations.

Support Services Offered & Available

Many organizations in the Atlantic region offer a wide range of supports to assist tourism businesses with their economic sustainability and positive impact on the economy. The forms of support range from business development support, marketing, training, leadership, advocacy and industry research.

This report has researched over 130 organizations in the Atlantic region that provide various forms of support to tourism industry businesses. The breakdown of types and quantity of support organizations:

- Marketing & Business Development Support Organizations: 54
- Funding & Lending Support Organizations (including government-led programs): 56
- Other Support Organizations (training, technical support etc.): 24

An analysis of supports offered by industry support organizations to Indigenous tourism suppliers in Atlantic Canada reveals four themes:

1. There are numerous organizations in Atlantic Canada offering support to Indigenous tourism businesses however often have limitations in terms of eligibility and volume of businesses they can assist and complexity of their application process.
2. The majority of support organizations offer product development training and marketing which matches two of the priority needs of most Indigenous tourism businesses in the region.
3. Advocacy and leadership are also frequently offered however both suppliers and supporters do not show this as a priority need as compared to other Indigenous tourism business needs.
4. The survey respondents indicated they do not offer support for business partnerships and the background research completed from online resources showed fewer than 10 support organizations list this as a service they offer out of over 130 organizations researched.

Atlantic Canada Gap Analysis

Within the Atlantic region, gaps in satisfying market demand as well as gaps in support service and needs were identified when comparing primary survey data collected from both Indigenous tourism suppliers/operators and supporters of Indigenous tourism. These gaps identify opportunities to prioritize recommendations to move forward on a region-wide basis to address the gaps and determine potential solutions to narrow or eliminate these gaps.

Based on the data collected, both the suppliers and supporters agree that the top opportunities are product development, marketing, and support for an Indigenous tourism association. This lack of a gap is equally important to identify as it demonstrates where suppliers and supporters are aligned and recommendations can therefore be designed moving forward from this place of alignment.

Supporting organizations also feel industry support is a key opportunity which is typically provided through advocacy, research and provision of support programs and projects. Suppliers/operators feel that access to capital and funding, training and partnerships are also key opportunities.

A gap analysis within the Atlantic region identified the following key issues and observations:

- Both the Indigenous tourism suppliers and supporters agree that the top opportunities to grow and strengthen the Indigenous tourism industry are:
    - product development
    - marketing
    - support for Indigenous tourism associations
- In addition to the key opportunities listed above, supporting organizations also feel industry support is a key opportunity (typically provided through advocacy, research and provision of support programs and projects) while suppliers/operators feel that access to capital and funding, training and partnerships are also key opportunities
- Both the suppliers and supporters agree that the low number of market and export-ready products and difficulty in reaching or maintaining those standards are key challenges for Indigenous tourism in the region
- In addition to the key challenges listed above, supporters also feel there is a lack of community support while suppliers did not list lack of community support as a significant challenge; however suppliers feel there is limited partner support and low marketplace awareness as well as uncertainty in accessing funding and capital support
- With respect to support needs versus support availability, product development training is the most common support offered however is shown to be the third most often support requested by suppliers; Indigenous tourism research and advocacy/leadership is widely available in the region however these supports are less frequently prioritized by suppliers
- Support to develop business partnerships is the fourth highest support needed by suppliers however is the least frequently type of support offered
- Training, technical support and marketing support are equally offered by supporters and requested by suppliers
- Supporting agencies see business development as the key to growth for Indigenous tourism in Atlantic Canada however suppliers and operators however feel that funding and support is the key.

Provincial Gap Analysis

Within the Atlantic region, the primary survey data collected can be sorted based on provincial location of the businesses and supporting organizations. This data was analysed to identify gaps or differences in four key data categories when comparing responses province by province.

The following provincial differences were identified, and these differences allow for province-specific recommendations and actions to be considered that are unique to the province as compared to the majority of Atlantic provinces.

In summary, a gap analysis comparing the research from the four provinces of the Atlantic region identified the following key issues and observations.

New Brunswick:

In comparison to the other Atlantic provinces, NB has identified these priorities:

1. This province is looking for help in developing effective partnerships with other tourism businesses (B2B partners) and product development training
2. NB feels that their province particularly struggles with leadership and coordinated approach, and collaboration between Indigenous & non-Indigenous businesses and organizations.

Newfoundland & Labrador:

In comparison to the other Atlantic provinces, NL has identified these priorities:

1. This province is looking for help in marketing to increase awareness, marketing training and technical support (legal, financial, H.R. etc.)
2. NL feels that they struggle more than other provinces with uncertainty or confusion in accessing funding and capital investment.

Nova Scotia:

In comparison to the other Atlantic provinces, NS has identified these priorities:

1. NS is looking for community-based training & support, support for an Indigenous tourism association, support from tourism industry & political leadership and access to financing
2. NS feels that they struggle more than other provinces with limited leadership and coordinated approach and the economic sustainability of Indigenous tourism industry
3. NS also shows a specific interest in partnerships with tourism marketing organizations.

Prince Edward Island:

In comparison to the other Atlantic provinces, PEI has identified these priorities:

1. This province is looking for community-based training & support, marketing support, product development training, tourism research, frontline training, and development partnerships
2. PEI feels that they struggle more than other provinces with market/export readiness standards, and collaboration between Indigenous & non-Indigenous organizations.

Comparing Community-Owned to Entrepreneur/Non-Community-Owned

Within the Atlantic region, the primary survey data collected was also sorted based on if the ownership of the tourism supplier or operator was community-owned or entrepreneur-owned. This data was analysed to identify gaps or differences in four key data categories when comparing responses based on if the business was community or non-community owned.

Several opportunities are shown to be a consistent level of priority for both community and non-community owned tourism businesses such as ‘product and business development’ as it is listed as the top opportunity by both types of ownership. Both types of ownership also agreed as demonstrated through their responses that partnerships, tourism industry support, training, support for an Indigenous tourism association and access to funding were listed at a similar level of priority opportunities for growing Indigenous tourism.

In summary, a gap analysis comparing the research from Atlantic operators who are community-owned and non-community-owned identified the following key issues and observations.

Community-Owned Indigenous Tourism Suppliers/Operators:

In comparison to non-community-owned suppliers, community-owned suppliers and operators have specific priorities to address:

1. Community-owned suppliers see a greater need for community-based training, access to financing, support from the tourism industry, and front-line training support
2. These operators see limited partner support and community support as a greater challenge
3. They are looking for improved partnerships with other tourism businesses and with tourism marketing organizations.

Non-Community-Owned Indigenous Tourism Suppliers/Operators:

In comparison to community-owned suppliers, non-community-owned suppliers and operators have specific priorities to address:

1. Non-community-owned suppliers see a greater need for increased marketing, marketing training and product & business development
2. These operators see business readiness standards, marketplace awareness and workforce shortages as a greater challenge
3. Partnerships they are looking to improve are with the travel trade, Indigenous/non-Indigenous businesses & organizations, and training & development partners.

Recommendations

This study has been designed and built to provide direction, guidance, and priority recommendations to assist in identifying economic opportunities as well as the needs and barriers in the tourism sector for First Nations and Inuit communities in Atlantic Canada.

Overall Recommendations to Grow Indigenous Tourism in Canada

The six key national opportunities identified in the Conference Board of Canada research to focus on for growth in Indigenous tourism that are highly relevant for Atlantic Canada are:

1. Focus on product development – critical to securing greater consumer and travel trade interest.
2. Improve competitiveness – improves potential growth in market share and can be achieved through enhanced business development and partnerships.
3. Meet consumer demand – based on target market demands, deliver product development that is authentic, unique and engaging, and can be paired with other experiences.
4. Deliver business support – build support from local communities and establishing strong industry associations with targeted and strategic priority goals.
5. Targeted marketing - increase demand through marketing that raises awareness and converts that interest to purchase and visitation through a) targeted communications channels and b) at the right stage(s) of their path-to-purchase.
6. Increased collaboration – grow the Indigenous tourism economy by working closely with Indigenous tourism businesses and the mainstream tourism industry.

Regional Recommendations for Atlantic Canada

The following recommendations specifically reflect the research and engagement findings from this study. The full 'Recommendations' section in this report also provides context and reasoning for each of these recommendations.

Atlantic Region Recommendations for Planning & Activation in 6-12 Months

1. Regional funding and development support agencies should come together to develop a multi-partner, multi-year program to focus specifically on regional priorities identified in this report and to keep the partnership momentum moving forward.
   Key support partners need to be identified in each province and at the regional level to come together in a focused and strategic approach to move key initiatives and recommendations forward. Initial projects would include:
   - Multi-year funding and support application program through a regional SPI program (similar program already in use elsewhere in Canada)
   - Identifying specific support & partnership needs to grow each provincial Indigenous tourism association
   - Identifying key existing support programs to promote and/or create/upgrade for Indigenous tourism (i.e.: marketing, product development, partnerships, leadership)
   - Supporting regional support priorities and research recommendations listed immediately below.

2. Access to finances and funding is a key form of support requiring further review and research relating to making capital available to Indigenous tourism businesses in an effective manner. This review requires consideration of:
   a. Gap analysis - Types of funding available as compared to types of funding needed/requested
   b. What is the funding for? What does this reveal? (i.e.: operations or development)
   c. Identify most significant barriers in the application process
   d. Need to measure ROI to demonstrate level of impact and to track funding value
   e. Best practices of financing programs for small businesses (based on ROI & impact)
   f. Are there aspects of tourism business development that can be supported by capacity development rather than direct funding support?

3. Across the region, each Indigenous tourism association should identify best practices from this report that are relevant for their organization and focus on activating support programs that assist with:
   a. Tourism industry collaboration
   b. B2B partnerships
   c. Indigenous tourism industry research
   d. Delivering support projects and programs (including COVID-19 recovery)

4. Develop and deliver a program of community workshops offered to individual communities providing community-based strategic planning education and coaching customized specifically to the needs of each community and their current level of tourism development and understanding of the industry.

5. An online Indigenous tourism support hub should be developed and actively managed for the Atlantic region to allow Indigenous businesses to find the support they need (including COVID-19 recovery) and should include basic eligibility filtering. The spreadsheet supplied in this report should be developed into an online resource searchable based on, for example, location, type of business ownership, type of support needed etc.

Recommendations for Long-Term Support Across the Atlantic Region

1. Support for Indigenous tourism in the region should be focused on a) COVID-19 recovery, b) product development, c) marketing and d) support for provincial Indigenous tourism associations.
2. Product development support needs to specifically focus on increasing the number of market or export-ready Indigenous tourism businesses while recovering from COVID-19.
3. A wide range of supports are required by suppliers/operators in Atlantic Canada. Support should be inclusive of all levels and types of tourism business and destination development and not be limited to just two or three primary types of support.
4. Product development (either new or modified) should focus on outdoor & adventure, and tours & related services (includes cultural workshops/training, packaged tours, info centre/desk, tour operator/tour packages)
5. Indigenous tourism associations in provinces that have established Indigenous organizations (such as tribal councils or multi-agency committees) who also have a specific tourism strategy should collaborate and partner on programs, projects and funding efforts. For example, in Nova Scotia (Mi'kmaw Cultural Tourism Strategy) and in PEI (Mi'kmaq Confederacy of PEI - Indigenous Tourism Roadmap for PEI)
6. Develop and deliver support programs and opportunities to assist with developing mutually beneficial business to business (B2B) partnerships and business to industry relationships. Provincial Indigenous tourism associations have an opportunity to drive these partnership-specific support programs.
7. Indigenous tourism associations and businesses should review potential alignment with Atlantic strategies such as: The Atlantic Growth Strategy (i.e.: "Build My Tourism Business" site has a button offering 17 additional links for guidance and support for tourism businesses in the region) LINK
8. Indigenous tourism businesses and tourism associations should include France as a key target market when marketing towards long-haul, international visitors seeking Indigenous experiences

Atlantic Region Recommendations Specifically for Building a Provincial Indigenous Tourism Association

Provincial Indigenous tourism associations in Atlantic Canada should follow the key best practices in Canada identified by this report (listed below) to establish a sustainable Indigenous tourism organization. An extensive best practices analysis completed in this study of successful Indigenous tourism organizations in Canada identified 13 key components to success for any provincial Indigenous tourism association to consider.

i. Develop and deliver extensive marketing programs and activities in partnership with destination marketing organizations to a) guide and support Indigenous businesses in their marketing efforts and b) provide direct to consumer and travel trade promotions and awareness on behalf of market and export ready businesses.

ii. Maintain a strong priority for business/product development to reflect marketplace gaps, consumer demands and ability to offer market-ready experiences to consumers; particularly focus on establishing or strengthening market or export readiness for eligible businesses.

iii. Create close, established relationships with funding partners through a mutually beneficial partnership to build financial stability and sustainability.

iv. Deliver active leadership and advocacy for Indigenous tourism in the tourism industry to build awareness, respect, opportunity for collaboration, strategic alignment, and support.

v. Establish an effective strategic planning process to build and grow an Indigenous tourism organization through engagement, research, funding partnerships and effective organizational governance and operations.

vi. Set measurable goals and timelines demonstrating specific targets to achieve through the strategic plan and programs.

vii. Create close partnerships with industry organizations with aligned strategies and mandates.

viii. Establish and operate a membership (or stakeholder) program that maximizes participation through a) low cost of membership, b) relevant, useful benefits and c) active communication and coordination with members on a regular consistent basis.

ix. Maintain visible activity in the mainstream tourism and corporate environment through hosting of events, participation on committees and attendance at industry conferences, marketplaces/ trade shows to build awareness of the organization and identify partnerships and collaborations.

x. Develop a regional approach to business and community support to adapt to regional differences and issues through region-specific programs and regional coordinators.

xi. Build organizational adaptability to changes in the political or economic environment to allow the organization to survive changes or threats out of the control of the organization; typically this is achieved with a diverse funding and partnership base and the ability to scale the organization programs and staffing based on available funding and support.

xii. Review and develop self-earned revenue streams to help offset project costs or to expand projects (i.e.: events, membership, marketing collateral, direct-to-consumer sales channels).

xiii. Collaborate with Indigenous community leadership demonstrating understanding that support from community leadership is critical and also to benefit from the existing economic development support programs and administrative systems available to community-owned businesses.

Provincial Priorities within Atlantic Canada

Within the Atlantic region, research and engagement data was analyzed to identify priority areas of focus based on the provincial location of the businesses and supporting organizations.

All of the Atlantic region provinces see limited market/export-ready Indigenous tourism product as a significant challenge and all of them prioritize marketing support & training, and product development training as most important forms of support required. All provinces also see that the focus of their provincial Indigenous tourism association should be on partnerships with tourism industry organizations and establishing relationships with Indigenous businesses & entrepreneurs.

The following province-specific priorities are in addition to the shared priorities and recommendations for the entire Atlantic region listed in this section above.

New Brunswick - Indigenous Tourism Priorities	
Supports Needed	• Product development training • Front-line training
Key Challenges to Address	• Limited leadership and coordinated approach • Collaboration between Indigenous & non-Indigenous businesses and organizations
Partnership Assistance	• Other tourism attractions or experiences • Tourism industry organizations
Focus of provincial Indigenous tourism association	• Deliver support projects and programs for Indigenous tourism • Establish a financially stable organization

Newfoundland & Labrador - Indigenous Tourism Priorities	
Supports Needed	• Marketing support & training • Technical support (legal, financial, H.R. etc.)
Key Challenges to Address	• Confusion in accessing funding and capital investment
Partnership Assistance	• Tour operators/ travel agencies
Focus of provincial Indigenous tourism association	• Deliver support projects and programs for Indigenous tourism • Understand opportunities / challenges of Indigenous tourism (research and engagement)

Nova Scotia - Indigenous Tourism Priorities	
Supports Needed	• Support from tourism industry & political leadership including building leadership and a coordinated approach, product development, and building economic sustainability of the Indigenous tourism industry • Access to financing and funding opportunities
Key Challenges to Address	• Limited leadership and coordinated approach • Economic sustainability of Indigenous tourism industry
Partnership Assistance	• Tourism marketing organizations
Focus of provincial Indigenous tourism association	• Protect misuse of art and cultural knowledge in tourism • Understand opportunities / challenges of Indigenous tourism (research and engagement)

Prince Edward Island - Indigenous Tourism Priorities	
Supports Needed	• Marketing support & training • Product development training • Tourism research • Frontline training
Key Challenges to Address	• Challenging market/export readiness standards • Collaboration between Indigenous & non-Indigenous businesses and organizations
Partnership Assistance	• Training & development partners • Other non-tourism partners
Focus of provincial Indigenous tourism association	• Develop understanding and trust with community leadership • Protect misuse of art and cultural knowledge in tourism • Create and follow a strategic plan for the association

Ownership-Based Priorities within Atlantic Canada

Within the Atlantic region, research and engagement data was analyzed to identify recommended areas of focus based on if the business was community or non-community (entrepreneur) owned. Both community and entrepreneur-owned businesses see lack of market and export-ready products as a significant challenge and are looking for more product development training support.

The following ownership-specific priorities for Indigenous tourism businesses in Atlantic Canada are in addition to the shared priorities and recommendations for the Atlantic region listed earlier in this section.

Community-Owned Indigenous Tourism Priorities	
Supports Needed	• Community-based training • Access to financing • Support from the tourism industry • Front-line training support
Key Challenges to Address	• Limited partner support • Community support
Partnership Assistance	• Other tourism businesses • Tourism marketing organizations (DMO’s, Regional DMO’s)

Entrepreneur-Owned Indigenous Tourism Priorities	
Supports Needed	• Increased marketing & marketing training • Product & business development
Key Challenges to Address	• Achieving/maintaining business readiness standards • Marketplace awareness • Workforce shortages
Partnership Assistance	• Travel trade • Indigenous/non-Indigenous businesses & organizations • Training & development partners

Project Overview

Background

Joint Economic Development Initiative (JEDI) hired a consulting firm to produce an opportunities analysis or study of Indigenous tourism that identifies economic opportunities as well as the needs and barriers in the tourism sector for First Nations and Inuit communities in Atlantic Canada.

JEDI is an Indigenous not-for-profit organization dedicated to supporting Indigenous participation in New Brunswick's economy. JEDI works closely with its partners from Indigenous communities, organizations, government and the private sector to foster Indigenous economic and workforce development in New Brunswick.

Project Objectives

The goal of the project was to develop a report that will clearly lay out the opportunities, needs, and available economic development supports for First Nations and Inuit communities seeking to enter or expand in the tourism sector in Atlantic Canada.

The objective was to create a comprehensive opportunities analysis study with information that can be used by First Nations and Inuit communities, organizations, and entrepreneurs and funding entities to inform a path towards successful economic opportunities, business models, and partnerships within the tourism sector in Atlantic Canada.

Deliverables

As identified in the Request for Proposal, the activities and deliverables to be undertaken by the successful proponent are:

- Market Analysis - Current and future market analysis of the tourism sector and Indigenous tourism in Atlantic Canada presented as a region and by province;
- Best Practices - An analysis of provinces where the sector is becoming established and report on the conditions needed to replicate this success in the Atlantic provinces;
- Inventory and Review of Support Organizations - Identification of all national, provincial, and regional organizations involved in the development and promotion of the tourism sector in Atlantic Canada and summary information on the mandates and activities of these organizations;
    - Where applicable, this review should differentiate between economic development supports that focus on First Nations and Inuit community-led tourism initiatives and those led by Indigenous entrepreneurs/private businesses;
- Gap Analysis - Gap analysis of current economic development programming and funding in Atlantic Canada available to First Nations and Inuit-led Indigenous tourism initiatives. Including but not limited to: funding entity, eligible activities, eligible entities;
- Recommendations Report - Based on the findings of the study, provide recommendations within the context of each of the 4 Atlantic provinces for supporting the growth of the Indigenous tourism sector in the region.
    - In addition to being broken down by province, these recommendations should include and differentiate, where applicable, between recommendations that would support community-led Indigenous tourism initiatives and individual Indigenous tourism entrepreneurs.

Project Scope

The project scope covers four main components summarized below to achieve the project deliverables and objectives.

1. Project Initiation
    a. Conduct a project start-up meeting with client and steering committee, Many Chief Consulting will present its proposed project approach and strategy
    b. Client and steering committee will confirm:
        i. Project objectives and scope
        ii. Communication protocols and procedures
        iii. Budget and overall timelines and milestones for the project
        iv. Confirmation of reporting channels and points of contact
        v. Identification of internal or external constraints and risks that may impact the project
        vi. Agree on timing of regular project check-in calls
    c. Many Chief Consulting will adjust the approach, strategy, scope, work plan and budget based on feedback from start-up meeting
    d. Client will confirm and approve adjustments
2. Industry and Regional Research
    a. Market analysis of the tourism sector and Indigenous tourism in Atlantic Canada
    b. Provincial analysis of provinces with established Indigenous tourism industry
    c. Review of tourism development approach based on business readiness
    d. Summary of all national, provincial, and regional organizations involved in development and promotion of the tourism sector in Atlantic Canada
    e. Analysis of national, provincial, and regional organizations in the tourism sector with focus on marketing and development and their mandate and key activities
    f. Analysis of economic development supports for Indigenous community-led and entrepreneur-led tourism businesses
    g. Identification of and gap analysis of current economic development programming and funding support in Atlantic Canada available to First Nations and Inuit Indigenous tourism initiatives
    h. Analysis of Indigenous tourism businesses needs and barriers.
    i. Provincial-specific recommendations within the context of each of the four Atlantic provinces for supporting the growth of the Indigenous tourism sector.
    j. Development of individual province-based recommendations for community-led and entrepreneur-led tourism initiatives and businesses
3. Stakeholder Engagement
    a. Project Meetings
    b. Identify Stakeholder key contacts to engage
    c. Develop interview questions to collect the necessary information and data from the engagement process and organize data in preparation for analysis and review.
    d. Collect information and data from key contacts to inform plan:
        i. Indigenous organizations across Atlantic Canada involved in economic development and community capacity development
        ii. Provincial and Federal representatives operating in economic development policy and programming related to Indigenous and non-Indigenous tourism and economic development
        iii. Indigenous and non-Indigenous national, provincial, and regional tourism associations/industry representative organizations active in Atlantic Canada

4. Analysis and Reporting
    a. Mid-point report presentation to Steering Committee
        i. Development of Mid-point Report
        ii. Development of Mid-point Report Presentation
        iii. Delivery of Mid-point report to Steering Committee
    b. Final Report and presentation to Steering Committee
        i. Development of Final Report
            - Summarize feedback and observation
            - Identify trends and themes
            - Summarize components of comprehensive opportunity analysis
            - Provide recommendation for Atlantic Provinces
        ii. Share draft report with JEDI and collect feedback
        iii. One Round of Revisions to Final Report
        iv. Development of Final Report Presentation
        v. Delivery of Final Report & Presentation

Approach

Many Chief Consulting Ltd. worked with JEDI and the Steering Committee. JEDI was the main contact and coordinator for this project and JEDI was the Chair of the Steering Committee.

The proposed approach involves four key components:

The approach depicted above demonstrates that research and engagement are both utilized to inform the analysis and reporting provided by the overall study. The three sections of research in this report were completed prior to activating the engagement ; the engagement activation will assist in informing the supports versus needs gap analysis and the final study recommendations for supporting growth of the Indigenous tour ism sector in the Atlantic provinces.

The project approach schedule was revised after the initial launch to take into consideration new health and safety measures as it related to the COVID-19 pandemic.

Key Updates to the Project Timeline due to COVID-19:

- The project time line was extended from 18.4 weeks to 24.0 weeks, being completed by mid-August.
- The Research Phase and Engagement Phase would not run concurrently as originally planned.
- The project delivery was revised to be developed in three consecutive phases:
    - Phase 1 – Research: Week 1 to 7 (March 2 – April 17)
    - Phase 2 – Engagement: Week 10 to 16 (May 4 – June 22)
    - Phase 3 – Analysis & Reporting: Week 19 to 22 (July 6 – July 31)
- The original mid-point steering committee meeting be divided into two meetings:
    - Research Phase Review Committee Meeting
    - Engagement Phase Review Committee Meeting
- The Final Report Presentation and meeting will take place in mid-August.

Project Leads

Joint Economic Development Initiatives (JEDI) is a leading Indigenous organization dedicated to working with partners to foster Indigenous economic development in New Brunswick. JEDI provides its clients with a variety of Indigenous business and workforce development services. JEDI serves Indigenous people across New Brunswick and works closely with partners in the public and private sector.

Joint Economic Development Initiative

For the development of the Atlantic Canada Indigenous Tourism Study the project lead for JEDI was Penny Polchies, Economic Development Manager.

Steering Committee

The Atlantic Canada Indigenous Tourism Study Steering Committee provided their expertise and knowledge in the field of tourism and Indigenous tourism in the Atlantic Canada region. The Steering Committee consisted of tourism industry representation and Indigenous tourism representatives for the four Atlantic Canada provinces.

Organization	Area	Name	Title
Joint Economic Development Initiative (JEDI)	Project Lead Org.	Penny Polchies	Economic Development Manager
Joint Economic Development Initiative (JEDI - ad hoc member)	Project Lead Org.	Jean-Francois Mallet	Market Access Officer
ISC - Economic Development (Strategic Partnerships Initiative)	Atlantic Canada	Blake Robichaud	Economic Development Advisor
ISC - Economic Development (Strategic Partnerships Initiative)	Atlantic Canada	Jennifer Taylor	Economic Development Advisor
Indigenous Tourism Association of Canada - Atlantic Region	Atlantic Canada	Robert Bernard	Atlantic Region Coordinator
Atlantic Canada Opportunities Agency	Atlantic Canada	Mike Rothenburg	Economic Development Officer
Indigenous - ITANB, Community tourism business manager	NB	Patricia Dunnett	ITANB & ITAC Board Member
Indigenous - Community Ec. Dev.	NB	Adam Simon	Project Manager, Mi'kmaq Heritage Path Tour, Elsipogtog Ec Dev
Tourism Industry - TIANB	NB	Carol Alderdice	Pres. TIANB/AITNB
Government - NB Dept. Tourism, Heritage and Culture	NB	Rita Godbout	Officer, Product Innovation
Indigenous - NLITA, Qalipu First Nation	NL	Tara Saunders	NLITA Chairperson, ITAC Board
Indigenous Tourism - Community Tourism, Nunatsiavut	NL	Jillian Larkham	Dir. Tourism Culture & Recreation, Nunatsiavut, NLITA Board
Indigenous Tourism - Community Tourism, Innu Nation	NL	Jack Penashue	Superintendent Innu Nation
Tourism Industry - Hospitality NL	NL	Craig Foley	HNL - CEO

Government - Tourism, Culture, Industry & Innovation	NL	Carol-Ann Gilliard	Dir. Sector Diversification, Tourism, Culture, Industry and Innovation
Indigenous Tourism - NSITEN & Business Operator	NS	Darrell Bernard	NSITEN Chair, ITAC Board Member
Indigenous - Community - Eskasoni First Nation	NS	Tracy Menge	Manager, Economic Development
Indigenous - Kwilmu'kw Maw-klusuaqn (Mi'kmaq Rights Initiative)	NS	Shannon Monk	Project Lead - Nova Scotia Mi'kmaq Cultural Tourism Strategy
Tourism Industry - TIANS & NSTHR	NS	Lisa Dahr	Manager, Industry Relations
Government - Tourism Nova Scotia	NS	Heather Yule	Manager, Experience Development
Indigenous - ITAPEI & Lennox Island & TIA-PEI Board Member	PE	Jamie Thomas	ITAPEI Board Member, Lennox Island Director, Culture & Tourism
Tourism Industry - Tourism Industry Association of PEI	PE	Corryn Clemence	CEO
Government - Dept of Economic Growth, Tourism and Culture	PE	Janet Wood	EGTC - Strategic Initiatives - Manager of Tourism Development
Other - Tourism Consultant, Educator/Trainer	PE	Laura Johnson	BDO - Tourism File

Project Consultants

Many Chief Consulting Ltd. was the successful proponent in conducting the research and engagement for the Atlantic Canada Indigenous Tourism Study. Many Chief Consulting Ltd is a 100% Indigenous-owned business consulting firm offering a wide range of services with a focus on community and small businesses using a respectful and responsible approach.

Team Member	Position
Tarra Wright Many Chief	Project Manager and Engagement Lead
Casey Vanden Heuvel	Principal Consultant and Researcher

TOURISM MARKET ANALYSIS

THIS SECTION INCLUDES A REVIEW AND ANALYSIS OF THE ATLANTIC TOURISM SECTOR

Tourism Market Analysis

Tourism in Canada has experienced steady growth over the past six years. According to Statistics Canada, Canada welcomed 22.1 million inbound visitors in 2019, marking the sixth consecutive year of increased travel to Canada. 2019 was also the third record-breaking year for tourism in 2019 and Canada saw gains from both mature and emerging visitor markets, showing that Canada remains a top destination for leisure, study and business travel.

This section of the report reviews and analyses the current and future of mainstream tourism and the Indigenous tourism market sector in Atlantic Canada as a region and also in each Atlantic province.

Atlantic Canada

<u>Overall Tourism Sector</u>

Tourism is a key industry and of strategic importance for Canada's Atlantic region. Tourism is estimated to contribute more than $5 billion annually to the Atlantic Canadian economy. In Atlantic Canada, tourism supports 9,800 regional businesses, employs 62,900 Atlantic Canadians and contributes nearly $5 billion annually to Atlantic Canada's Gross Domestic Product (GDP).[1]

In reviewing the specific volume of tourism activity reported by each province, it can be calculated that the Atlantic Canada region attracted almost $5.8 billion in tourism spending in 2018 and attracts four million overnight visitors. Of these visitors, approximately 87% are visitors from Canada and 13% international visitors including US and overseas. The Atlantic region has approximately 12.8 million room nights available each year and the region achieved a 53% average accommodation occupancy level. This data is based on 2018 statistics provided by each province, summarized in the chart below.

2018 Tourism Demand Data for Atlantic Canadian Provinces

Location	Tourism Spending (in millions)	Non-Resident Overnight Visitors	Domestic Overnight Visitors	International Overnight Visitors	Total Room Nights Sold	Accoms Occupancy Levels
New Brunswick	$ 1,570	n/a	n/a	n/a	1,859,901	58.2%
Newfoundland & Labrador	$ 1,130	533,507	474,821	58,686	1,400,000	45.6%
Nova Scotia	$ 2,610	2,400,000	2,073,500	339,400	2,800,000	55.0%
Prince Edward Island	$ 486	1,013,280	903,846	109,434	668,093	46.4%
Atlantic Canada (total of above)	**$ 5,796**	**3,946,787**	**3,452,167**	**507,520**	**6,727,994**	**52.6%**

Sources: ACOA, TIA-PEI, TIANB, HNL, TIANS

[1] Atlantic Canada Agreement on Tourism - https://acat-etra.ca/

Nova Scotia leads the region in terms of tourism spending in the province, total room nights sold and the number of non-resident overnight visitors. New Brunswick, however, has the highest average accommodations occupancy level at just over 58% as compared to the region average of 53%.

Research Relevant for Tourism Operators in Atlantic Canada

The Atlantic region successfully attracts visitation from across Canada, the United States and from overseas. For the Atlantic provinces, the primary geographic target markets within Canada are visitors from within the Atlantic region and Ontario. In the US, the geographic target markets are New England and the mid-Atlantic states. Overseas, the largest number of visitors come from the UK and Germany.

In 2018, Atlantic Canada Agreement on Tourism (ACAT) shared consumer research completed within key US tourism markets using a targeted segmented approach to better understand traveller characteristics and interests, travel behaviour and destination experiences, activities, as well as assess destination and brand awareness and other marketing and brand related components.[2]

The key markets: US Regions of Mid-Atlantic (New York, New Jersey and Pennsylvania) and New England (Maine, Massachusetts, New Hampshire, Connecticut, Vermont, and Rhode Island)

The targeted socio-demographic segments: older authentic experiencers, younger authentic experiencers and cultural explorers (based on Destination Canada Explorer Quotient research and market segmentation).

Key research findings from this 2018 consumer research shared by ACAT that is relevant to small and medium sized tourism businesses in Atlantic Canada:

Challenges

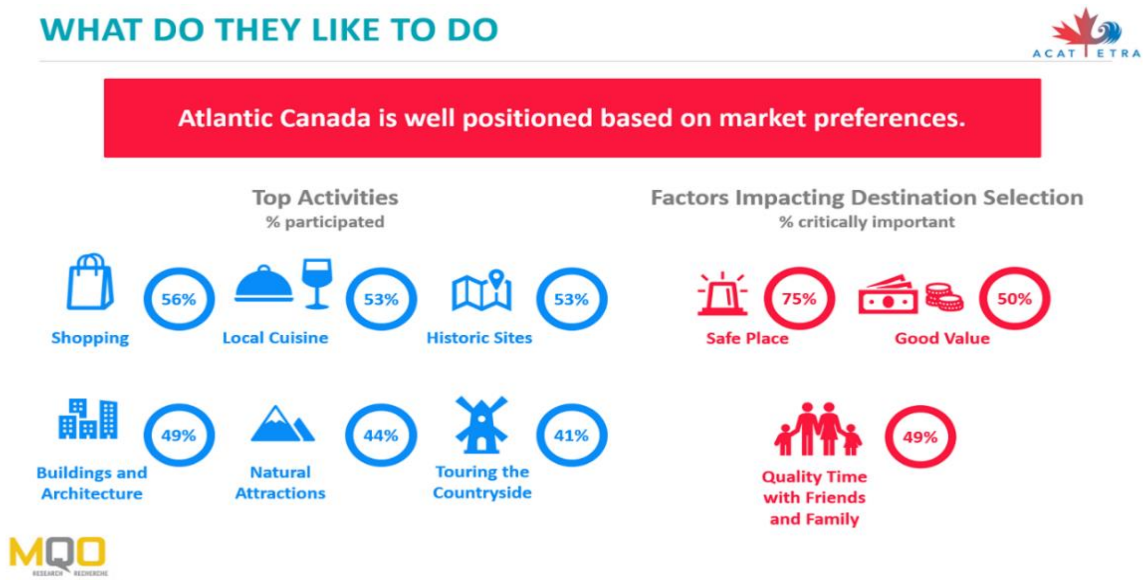
- US target markets are most likely to remain in US when travelling
- Minimal momentum in travel to Canada among Mid-Atlantic and New England travelers
- Ontario and Quebec are key competitors for the Atlantic Provinces in terms of attracting Mid-Atlantic and New England travelers

Opportunities

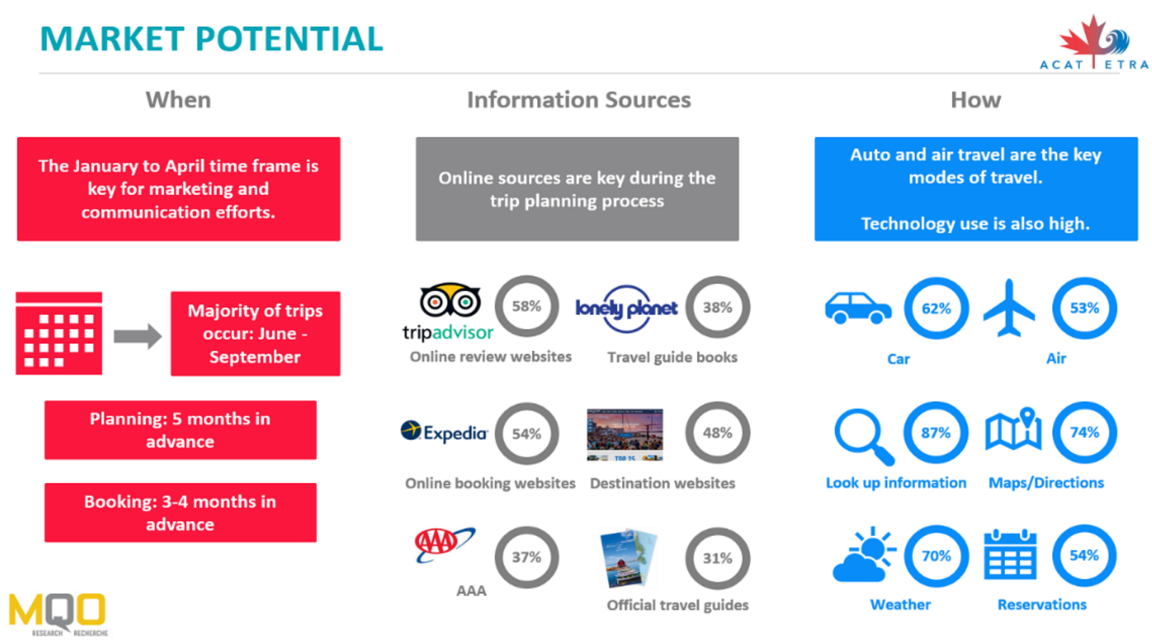
- One-in-five New England and Mid-Atlantic travelers are very likely to visit Canada within the next two years
- New England travelers were more likely to visit the Atlantic Provinces compared to Mid-Atlantic travelers
- Shopping and immersion in local culture two most popular activities
- Selection of destination most impacted by 1) safe place to visit, 2) offers good value for money and 3) a place to spend quality time with friends or family
- Online sources are key during the trip planning process, top three are: 1) review websites, 2) booking websites and 3) destination websites
- Vast majority of travelers use technology while on vacation - top uses included looking up information, directions and weather forecasts

[2] 2018 US Consumer Survey FINAL Summary Report – ACAT - https://acat-etra.ca/research-information/

Based on this ACAT Consumer Research, Atlantic Canada is well positioned to attract US visitors in close proximity to Atlantic Canada based on their key factors in determining their travel decisions as depicted in this infographic:



In order to attract the US traveller, it is important to understand their sources of information, the timing of their travel decisions and how they will travel to Atlantic Canada. ACAT consumer research shows in the infographic below these three important categories to attract visitation.



Expectations Moving Forward – Looking Towards the Future

Prior to the new reality of COVID-19, the Government of Canada (through the Atlantic Canada Opportunities Agency - ACOA) and the four Atlantic provinces partnered to create an Atlantic region growth plan. The Atlantic Growth Strategy was launched in 2016 by the Government of Canada and the four Atlantic Provinces as a pan-Atlantic, collaborative approach to support economic development in

Atlantic Canada. The growth plan includes a specific strategy for supporting and growing tourism in Atlantic Canada.

This broad economic development support plan includes a strategic and collaborative approach to tourism and includes $24.5 million in federal-provincial-industry investments for three initiatives aimed at positioning Atlantic Canada as a top destination in the global tourism sector, creating more jobs for Atlantic Canadians and giving a boost to small businesses.

For example, this new, multi-year partnership will promote the region's tourism offerings in key international markets and prepare Atlantic tourism operators to offer in-demand products and experiences.

Investments made through the new tourism strategy are expected to generate $200 million in export revenues for Atlantic tourism businesses over the next three years generated by the investments, efforts and programs of the tourism component of the Atlantic Growth Strategy. It is also expected to grow the region's tourism sector by 200 small-and medium-sized enterprises for a total of 9,800, and by 6,000 jobs, for a total of 63,000. [3]

Within much uncertainty created recently with COVID-19 there are existing structures in place to help the Atlantic Canada region recover. Through the Atlantic Growth Strategy and the key partners involved in establishing this growth strategy for the region, there is opportunity to reset and rebuild.

By the end of 2018, tourism revenues in Atlantic Canada had risen sharply with gains in spending, visitation volumes and room nights sold. Growth continued in 2019 as well.

The COVID-19 Effect – According to the United Nations World Tourism Organization (UNWTO) "Tourism is currently one of the most affected sectors".[4] With physical distancing requirements and much of the world practicing isolation in order to reduce the spread of the virus, many sectors of the economy have been significantly impacted. Tourism is particularly hard-hit as most of tourism relies on interaction with others. Access to modes of transport other than private cars have been reduced to essential travel needs only. Airlines in Canada have laid off ten of thousands of staff, hotels have stopped operating and laid off most of their staff, attractions including Disney have also shut their doors.

Considering the constant evolving nature of the pandemic situation, it is too early to estimate the full impact of the COVID-19 tourism. Considering the unparalleled introduction of travel restrictions across the world, as of March 26, 2020 the United Nations specialized agency for tourism expects that international tourist arrivals will be down by 20% to 30% in 2020 when compared with 2019 figures. This would translate into a decline in international tourism receipts (exports) of between US$300-450 billion, almost one third of the US$ 1.5 trillion generated in 2019.[5]

Predicting the future of tourism based on the current extreme circumstances is challenging, however some straight-forward changes should be considered by tourism businesses in Atlantic Canada:

1) Tourism will recover, it will not disappear as an industry. As demonstrated in the graph below produced by Twenty31 Consulting, tourism volumes are immediately impacted but rebound and grow considerably after a crisis such as 9-11, SARS and global economic crisis.[6]

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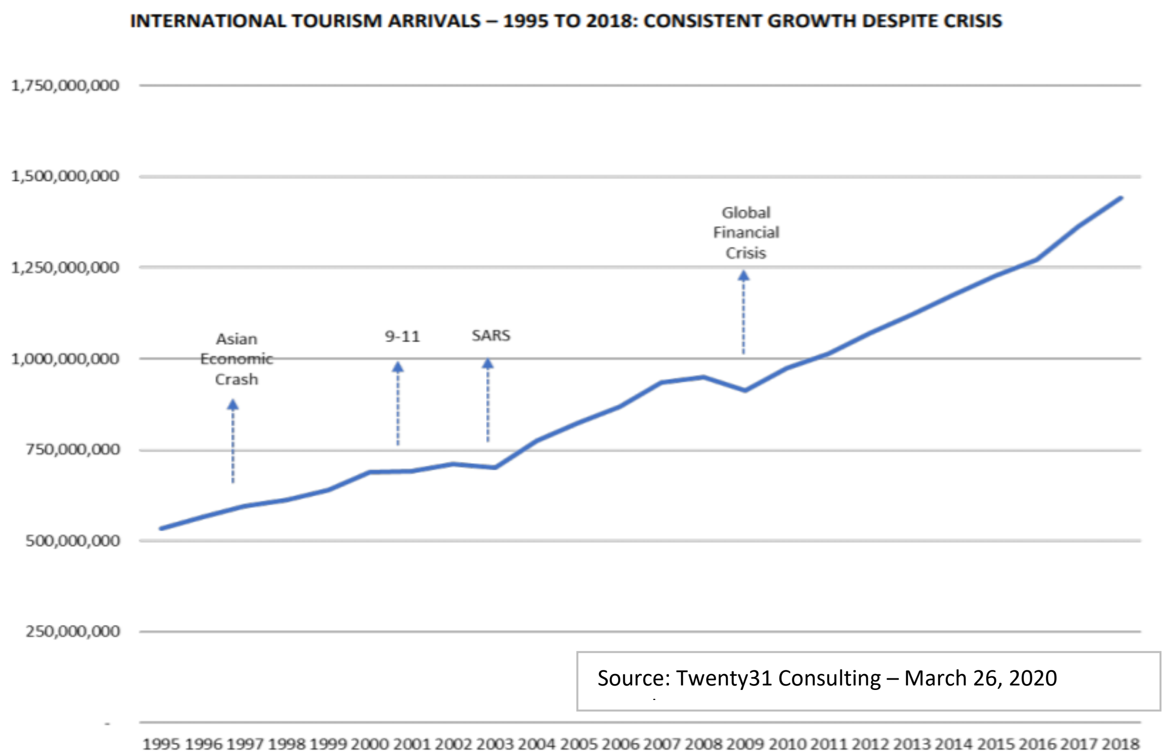
[3] Atlantic Canada Opportunities Agency - https://www.canada.ca/en/atlantic-canada-opportunities/atlanticgrowth.html

[4] United Nations World Tourism Organization (UNWTO) - https://www.unwto.org/tourism-covid-19

[5] UNWTO - https://www.unwto.org/news/international-tourism-arrivals-could-fall-in-2020

[6] Twenty31 LinkedIn Post - https://www.linkedin.com/posts/oliver-martin-242a0b8_twenty31s-perspectives-4-activity-6649353749473083393-rcpv



2) The cruise industry will likely experience longer-term challenges as well as potential supplier bankruptcy as this industry may not see a rapid return of guests until they can convince an understandable nervous travelling public (most of whom are seniors) of their safety and ability to implement serious health and environmental policies.

3) Destinations and their marketing/management organizations will work to provide leadership and potentially new strategic direction for their operators, their funders and the greater industry through the allocation of their stimulus funds to develop tourism recovery plans campaigns to support operators and inspire consumers.

4) Tourism operators and organizations who support/partner with them will need to focus on determining for their business the appropriate strategy to support marketing and business (re)development tactics to 1) identify the type(s) of travelers who might be the first to return to their business and 2) assess how to reach them with marketing and sales efforts.

5) More diversified tourism operators and destinations will likely see less of an impact from COVID-19 because of their ability to focus their efforts on components of their business that will see more immediate recovery. For example, a hotel and casino with a broad customer type will see business recovery relatively more immediately as compared to a remote bed and breakfast that relies on international travelers.

6) Regional travel and the 'drive market' is expected to represent a significant majority of travellers once travel restarts. This is mainly due to reduction of health risk by using your own car and staying within a travellers' region. In Atlantic Canada, regional travel is already the strongest market with, for example, half of overnight visitors in Nova Scotia come from Atlantic Canada and almost 60% of visitors to Nova Scotia arrive by car.

7) Business travel is also expected to be one of the first types of travellers to return to travel post-COVID-19. Tourism businesses who can attract and service the needs of the business traveller will have an opportunity to see more business, more quickly.

8) Businesses who survive will have an opportunity for greater market share (of a smaller market for the near future) because of businesses who have permanently closed or have reduced the scale of their operation. The opportunity will be to take the time during this economic shut-down to redesign, reconfigure and/or rethink the business model and products/services offered.
9) A 'new normal' will need to be planned and activated by tourism experience providers in terms of their health and safety protocols and processes. Those businesses that show a specific and meaningful effort to create a healthy environment will gain more positive response from the marketplace. This may require higher costs to operate with the possibility of an increase in fees passed on to the consumer.

Indigenous Tourism

Indigenous people total nearly 95,000 people in Atlantic Canada and represent 6.7% of the Indigenous population in Canada according to Statistics Canada. There are 34 First Nations; 15 in New Brunswick, 2 in Prince Edward Island, 13 in Nova Scotia and 4 in Newfoundland/Labrador.

Indigenous tourism, as it is referenced in this report, represents tourism offerings in Atlantic Canada which are owned or controlled by the Indigenous people in Atlantic Canada.

The UN World Tourism Organization published recommendations in 2019 on development of Indigenous tourism and explains the important opportunity and potential benefits of Indigenous tourism :" If managed responsibly and sustainably, Indigenous tourism spurs cultural interaction and revival, bolsters employment, alleviates poverty, curbs rural flight migration, empowers local communities, especially women and youth, encourages tourism product diversification, allows people to retain their relationship with the land and nurtures a sense of pride."[7]

Indigenous Tourism Defined

The Indigenous Tourism Association of Canada (ITAC) launched a national consultation with industry members, Elders and community to create and endorse the following definitions of Indigenous Tourism.[8]

Indigenous Tourism – all tourism businesses majority owned, operated and/or controlled by First Nations, Métis or Inuit peoples who can demonstrate a connection and responsibility to the local Indigenous community and traditional territory where the operation resides.

Indigenous Cultural Tourism – meets the Indigenous tourism criteria and in addition, a significant portion of the experience incorporates Indigenous culture in a manner that is appropriate, respectful and true to the Indigenous culture being portrayed. The authenticity is ensured through the active involvement of Indigenous people in the development and delivery of the experience.

Indigenous Cultural Experiences – does not meet the Indigenous tourism criteria however offers the visitor a cultural experience in a manner that is appropriate, respectful and true to the Indigenous culture being portrayed.

Indigenous Culinary Tourism – provides culinary experiences, including foraging and preparing food that represents and respects Indigenous culture and traditions.

With the diversity of Indigenous cultures across Canada, it is impossible to define universally what is appropriate to share, as something may be appropriate in one community and not in another. ITAC supports the authority of each community to determine its own cultural protocols and boundaries, and recognizes all of the diverse values and beliefs of our First Nations, Métis and Inuit peoples.

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[7] Recommendations on Sustainable Development of Indigenous Tourism – 2019 - https://www.e-unwto.org/doi/pdf/10.18111/9789284421299

[8] ITAC - National Guidelines Developing Authentic Indigenous Experiences in Canada – 2018 - https://indigenoustourism.ca/corporate/national-guidelines/

The following ITAC criteria are required for a business to be considered an authentic Indigenous experience by ITAC's National Standards.

- At least 51% owned by Indigenous individuals OR majority owned Indigenous companies OR Indigenous controlled organizations such as Bands and Tribal Councils.
- Use cultural content approved by Keepers of the Culture (i.e. Elders, hereditary Chiefs, families, etc.) and developed under the direction of the Indigenous people who are from the culture being interpreted.
- Offer cultural activities for guests led by Indigenous people (an exception may be when foreign languages are required although the interpreter should still have access to an Indigenous host for questions related to the culture and community).
- Provide opportunities for visitors to interact face-to-face with Indigenous people such as artisans, craftspeople, Elders, storytellers, hosts or entertainers whose origins are those of the culture being shared.
- Ensure that heritage interpreters and presenters have suitable experience, knowledge or formal training related to the Indigenous culture that they are sharing.

In 2018, the Indigenous Tourism Association of Canada (ITAC) partnered with The Conference Board of Canada to conduct research into the current state of the Indigenous tourism industry in Canada. This new research follows up from ITAC's previous nation-wide research project undertaken in 2015. The Conference Board of Canada research shows the Indigenous tourism sector growing at a rapid rate, outpacing Canadian tourism activity overall. The direct economic benefits (GDP) attributed to the Indigenous tourism sector in Canada rose 23.2% between 2014 and 2017, going from $1.4 billion to $1.7 billion. Compared with a 12.0% increase in overall tourism activity in Canada, this shows significant growth of the Indigenous tourism sector across the country in the past five years.[9]

<u>Five key findings highlighted in the research</u>:

1. Indigenous tourism sector growth is outpacing Canadian tourism activity overall.
   - Growth in Indigenous tourism sector employment and GDP is substantially outpacing growth in employment and GDP generated by overall tourism activity in Canada (employment: +18.7% vs +5.1%; GDP: +23.2% vs +12.0%)
2. Indigenous tourism is diverse and made up of many different business models.
   - While the main drivers of employment and GDP contributions come from air transportation and resort casinos, it is the cultural workers, such as Elders and knowledge keepers, who define many of the authentic Indigenous cultural experiences available to tourists in Canada.
3. Barriers to growth include access to financing and training.
   - Indigenous tourism is growing and wants to grow more, with business owners identifying access to financing and marketing support & training as their main barriers to growth.
4. International travellers are particularly important to Indigenous cultural tourism.
   - Compared with Indigenous tourism businesses without a cultural focus, those involved in cultural tourism more frequently mentioned tourists from foreign markets as part of their customer base.
5. Indigenous tourism has growth potential.
   - At the current pace of Indigenous tourism growth, and with continued investment, there is a strong case for ITAC to reach its goals outlined in its new Five-Year Plan: Accelerating Indigenous Tourism in Canada (2019–2024).

[9] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018 - https://indigenoustourism.ca/corporate/conference-board-of-canada-research/

Indigenous Tourism Supply in Atlantic Canada

The National research completed by the Indigenous Tourism Association of Canada (ITAC) in 2014 demonstrated that there were 143 tourism businesses in the Atlantic/Maritimes Region which was less than 9% of all Indigenous tourism businesses in Canada. However, this was an increase from 5% representation in 2001 and at that time, more than 30% of those Atlantic based Indigenous tourism businesses were retail based, 17% were festivals and events, another 17% were food and beverage and 12% were outdoor and adventure.[10]

ITAC updated their national research in 2018 to review the current supply of and demand for Indigenous tourism in Canada.

In terms of supply of Indigenous tourism businesses active in Atlantic Canada, the 2018 ITAC research produced by the Conference Board of Canada identified, by province, the number of businesses categorized by tourism industry sector. The table below shows the breakdown by province, by Atlantic region and comparison to nation totals.

Breakdown of Indigenous Tourism Business Inventory by Sector and Province

Tourism Sector	N.B.	N.L.	N.S.	P.E.I.	Atlantic	Canada
Accommodation	2	19	1	n/a	22	344
Arts & Heritage	18	21	14	10	63	518
Food & Beverage	13	6	3	2	24	159
Gaming	6	n/a	1	n/a	7	35
Recreation & Outdoor Adventure	2	2	n/a	1	5	251
Transportation	2	11	n/a	1	14	120
Travel Services (includes retail)	7	11	8	4	30	373
Other	1	2	2	2	7	75
Total of All Sectors	**51**	**72**	**29**	**20**	**172**	**1875**

Source: Canada's Indigenous Tourism Sector - Insights and Economic Impacts, Conference Board of Canada 2018

This table demonstrates that Atlantic Canada represents just over 9% of the national total of 1,875 businesses as of 2018. Atlantic Canada represents almost 8% of Canada's Indigenous population according to Statistics Canada (2016), this suggests Atlantic Canada is well represented in terms of proportion of Canada's overall number of businesses as compared to Indigenous population.[11]

Newfoundland and Labrador have the highest number of overall businesses and PEI with the fewest businesses.

Atlantic Canada has the highest proportion of Indigenous tourism businesses in the Arts & Heritage sector which is consistent with the overall Canadian numbers. Atlantic Canada has just five businesses (or under 3% of the total) that are Recreation and Outdoor Adventure whereas in Canada this sector of Indigenous tourism represents over 13% of all businesses. Accommodations in Atlantic Canada also represent a smaller percentage of the overall businesses (11%) as compared to Canada (18%).

[10] ITAC - National Aboriginal Tourism Research Project, 2015 - https://indigenoustourism.ca/corporate/national-aboriginal-tourism-research-report-2015/

[11] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

The economic impact of Indigenous tourism in Atlantic Canada is a very important consideration when attempting to understand the importance of the industry to the economy and the opportunity for it to grow its impact and significance to the overall economy and the economy for Indigenous entrepreneurs and communities. The table below demonstrates four key variables in measuring economic impact for an industry: the number of jobs, the labour income those jobs generate, the GDP contribution and the overall revenues generated.

Economic Impact of Indigenous Tourism

Labour, GDP and Revenues of Indigenous Tourism Business by Province

Region	Labour (Jobs)	Labour Income	GDP (basic prices)	Revenues
New Brunswick	829	$ 16.5	$ 24.3	$ 71.3
Newfoundland & Labrador	1,004	$ 33.4	$ 47.6	$ 95.2
Nova Scotia	876	$ 23.0	$ 31.6	$ 51.4
Prince Edward Island	187	$ 2.8	$ 4.2	$ 7.2
Atlantic Region	2,896	$ 75.7	$ 107.7	$ 225.1
Canada	39,036	$ 1,139.8	$ 1,742.6	$ 3,793.5

Source: Canada's Indigenous Tourism Sector - Insights and Economic Impacts, Conference Board of Canada 2018 NOTE: All $ values are in millions

This table details the significant number of jobs that Indigenous tourism represents in Atlantic Canada: almost 2,900 jobs representing almost $76 million in labour income. These jobs produce $108 million in GDP for the Atlantic region and generate over $225 million in revenues.

GDP generated by Indigenous tourism in Atlantic Canada in 2018 represented 5% of the Atlantic region's overall tourism GDP based on 2018 Statistics Canada data. The revenues generated by Indigenous tourism in the region represents just over 4% of all tourism revenues for Atlantic Canada.

When comparing the four Atlantic provinces, it is helpful to look at Indigenous tourism volume in each province as compared to the size of the Indigenous population in each province. The table below compares each province and determines the averages for the region. The data is shown as it relates to each 1,000 Indigenous people in that province and is based on the 2018 Indigenous tourism research funded by ITAC.

Indigenous Tourism Volume as Compared to Indigenous Population

	Indigenous Tourism compared to Indigenous Population		
	Jobs/1,000	Businesses/1,000	Revenue/1,000
NB	28.2	1.7	$ 2,426,821
NL	22.0	1.6	$ 2,082,103
NS	17.0	0.6	$ 998,155
PEI	68.2	7.3	$ 2,627,737
Atlantic	**22.4**	**1.3**	**$ 1,740,401**

Note: Table created based on 2018 ITAC data (www.IndigenousTourism.ca)

This table shows that overall, in Atlantic Canada there are 1.3 Indigenous tourism businesses in the region for each 1,000 of Indigenous population which supports 22.4 jobs and generates $1.74 million per 1,000 Indigenous population. PEI, the smallest province in Atlantic Canada in both size and Indigenous population, has the highest number of jobs, businesses (both by a large margin) and revenue per 1,000 of Indigenous population. Nova Scotia, in contrast, is the largest province based on Indigenous population but has, in the Atlantic region, the lowest number of jobs, businesses and revenue per 1,000 in population from Indigenous tourism.

Indigenous Tourism Demand in Atlantic Canada

With a steady increase in revenues generated by Indigenous tourism in Atlantic Canada over the past five years, the type of demand looking for Indigenous experiences will help understand how to support and grow the demand further. As detailed in the previous section of this report, Indigenous tourism demand in Atlantic Canada generates over $225 million each year through a diverse set of tourism businesses in the region.

The UNWTO's 2019 publication on their recommendations on sustainable development of Indigenous tourism states: "Tourists that visit indigenous communities … numbers are steadily increasing given the growth of tourism motivated by the interest to experience indigenous cultures and traditional lifestyles."[12]

The traveller is changing in terms of what they want to achieve and how they will achieve it. As shown below in the infographic from Destination Canada, the traveller is seeking a transformative experience which authentic Indigenous tourism can very effectively and honestly deliver.

Source: Destination Canada presentation at the IITC 2018 in Saskatoon, SK
https://indigenoustourismconference.com/wp-content/uploads/2019/11/Destination-Canada.pdf

In 2017 Canada's Indigenous tourism sector contributed $1.7B in direct economic impact, with roughly 1,875 Indigenous tourism businesses operating across Canada, employing just over 39,000 people. Since the Indigenous tourism sector was surveyed in 2015 there has been a 24% increase in gross domestic product over a three-year period, the number of businesses and jobs also experienced a significant growth of 23% and 18% respectively.[13]

Tourism industry research shows that more than one in three visitors to Canada are interested in an authentic Indigenous tourism experience based on research from Destination Canada.

The Indigenous Tourism Association of BC (ITBC) states "Trends in tourism indicate a strong and increasing demand for cultural tourism attractions. Put simply, more and more visitors are looking for experiences that immerse them in a culture different to theirs, allowing them to experience customs and traditions firsthand."[14]

Visitor exit surveys in both PEI and Nova Scotia indicate a strong interest from visitors to the Atlantic region for cultural experiences, festivals, events, culinary, local authentic tourism experiences and

[12] Recommendations on Sustainable Development of Indigenous Tourism – 2019
[13] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018
[14] Indigenous Tourism BC Corporate Website: https://www.destinationbc.ca/who-we-are/regional-community-industry-partners/indigenous-tourism/

art/artisans. This type of demand can be directly satisfied with authentic Indigenous tourism experiences.

Several specific research studies have assisted in understanding Indigenous tourism demand:

Destination Canada Indigenous Tourism Research

In 2017, the Indigenous Tourism Association of Canada (ITAC) partnered with Destination Canada to research US traveler opinions and understanding of Indigenous tourism in Canada. The report "Aboriginal Tourism US Qualitative Research" summarizes their findings from their in-depth qualitative research conducted to gain a better understanding of US consumer perceptions of Indigenous tourism experiences in Canada.[15]

The researchers reviewed the feedback and input from the focus groups and identified five key findings with implications for the Indigenous tourism industry in Canada.

1. **Authenticity is Key** - Authenticity appears to be a primary factor when considering Aboriginal tourism experiences.
2. **Interest is there, awareness is low** - There is an actively engaged group of travellers in the US who have a strong interest in Indigenous cultural experiences. These travellers value travel and unique experiences and are willing to spend money on it. However, awareness and understanding of Indigenous tourism in Canada are low.
3. **Indigenous Tourism Differentiation** - The research indicated that despite low awareness and a general lack of understanding, US travelers believe that Indigenous cultural experiences stand out from more typical travel experiences.
4. **Canadian Differentiation** - The focus groups expressed a sense that an experience in Canada could be more authentic than in the US. There is also an impression that authentic Indigenous tourism experiences can only be found in rural areas, and do not exist in cities.
5. **Strong & Compelling Positioning** - A business' brand positioning that focused on personal connections and unique experiences resonated best with US travellers in this research. They did not connect with positioning that was seen as too commercial.

ITAC Market Snapshots for Indigenous Tourism

Destination Canada and ITAC partnered on international market research[16] looking at the activities of travellers as well as their interest in Indigenous tourism experiences in Canada. The research covered ten countries in Asia Pacific, Europe, India and North America. This research report reviews the market snapshots for the top international targets for Atlantic Canada:

United States of America

In 2017, there were 14.3 million arrivals to Canada from the U.S. The U.S. ranks #1 for volume of inbound travel to Canada. Their average length of stay is 4.2 nights and, on average, spend $738 per person per trip (excluding any air travel). In comparison to 2016, travelers from the U.S. increased 3% in 2017.

Based on Destination Canada research, 18% of travelers from the U.S. took part in an Indigenous experience while travelling in the last three years and one third of this market is interested in an Indigenous cultural experience with 27% of visitors from the US likely to visit the Atlantic region.

[15] Destination Canada - Aboriginal Tourism US Qualitative Research: Summary of Findings and Considerations – 2017 - https://www.destinationcanada.com/en/sectors/indigenous-tourism

[16] ITAC - Market Snapshots: Understanding the Opportunity for Indigenous Tourism Business in Canada – 2019 - https://indigenoustourism.ca/corporate/wp-content/uploads/2018/11/2019-Market-Snapshots-Destination-Canada.pdf

United Kingdom

In 2017, there were 763.7 thousand arrivals to Canada from the United Kingdom (UK). The UK ranks #2 for volume of inbound travel to Canada. Their average length of stay is 9.8 nights and, on average, spend $1,792 per person per trip (excluding any air travel). In comparison to 2016, travelers from the UK decreased 4% in 2017.

Based on Destination Canada research, 19% of travelers from the UK took part in an Indigenous experience while travelling in the last three years and 37% of this market is interested in an Indigenous cultural experience with 21% of visitors from the UK likely to visit the Atlantic region.

France

In 2017, there were 574.4 thousand arrivals to Canada from France. This country ranks #4 for volume of inbound travel to Canada. Their average length of stay is 13.0 nights and, on average, spend $1,778 per person per trip (excluding any air travel). In comparison to 2016, travelers from France increased 5% in 2017.

Based on Destination Canada research, 37% of travelers from France took part in an Indigenous experience while travelling in the last three years and a very impressive 63% of this market is interested in an Indigenous cultural experience with 28% of visitors from France likely to visit the Atlantic region. The attached graphic shows that exploring Indigenous culture is ranked #3 in top activities of interest for visitors from France, the highest of any international target market for Atlantic Canada.

Germany

In 2017, there were 370.9 thousand arrivals to Canada from Germany. Germany ranks #5 for volume of inbound travel to Canada. Their average length of stay is 14.9 nights and, on average, spend $2,293 per person per trip (excluding any air travel). In comparison to 2016, travelers from Germany increased 5% in 2017.

Based on Destination Canada research, 33% of travelers from Germany took part in an Indigenous experience while travelling in the last three years and 47% of this market is interested in an Indigenous cultural experience with 19% of visitors from Germany likely to visit the Atlantic region.

China

In 2017, there were 672.3 thousand arrivals to Canada from China. The China market ranks #3 for inbound travel to Canada. Their average length of stay is 15.8 nights and, on average, spend $2,668 per person per trip (excluding any air travel). In comparison to 2016, travelers from China increased a significant 12% in 2017.

Based on Destination Canada research, 27% of travelers from China took part in an Indigenous experience while travelling in the last three years and 35% of this market is interested in an Indigenous cultural experience with 32% of visitors from China likely to visit the Atlantic region.

Explorer Quotient Profiles

Destination Canada has developed the Explorer Quotient toolkit that provides businesses with valuable insights into why and how different people like to travel. The Explorer Quotient incorporates traditional market research and looks at the deeper purposes that people choose to travel including personal beliefs, social values, and world views.[17]

[17] Destination Canada Explorer Quotient Toolkit – 2013 https://www.destinationcanada.com/sites/default/files/archive/206-Explorer%20Quotient%20Toolkit/toolsexplorerquotienttoolkitjul2018en.pdf

Destination Canada's research indicates that the Explorer Quotient types of visitors that are looking for an Indigenous tourism experience are Cultural Explorers and Authentic Experiences.

Cultural Explorers: From the Destination Canada EQ report, Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit. Personality traits: Open, accepting, non-traditional, enthusiastic, creative.

Authentic Experiencers: Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

<u>Traveller Purchase Behaviour: Path to Purchase</u>

Research shows that most travelers commit to an Indigenous experience after they have arrived at their destination. Results from research led by Destination Canada, lead to the conclusion that for most travelers, engagement in Indigenous tourism experiences is a much valued 'add-on' that arises as an unanticipated side benefit in a broader purposed trip.[18]

This has important implications for Indigenous tourism marketing strategies:

1. To take advantage of the trend of travelers purchasing Indigenous experiences while at their destination, focus on purchase points for travelers while on their trip such as visitor information centers, concierge desks and in-market promotions and marketing.
2. To overcome the challenge of travelers generally not pre-purchasing Indigenous experiences, develop partnerships with established products/ experiences and tour operators in order to be considered as an 'add-on' experience to purchase pre-trip as part of a package of experiences.

Expectations Moving Forward – Looking Towards the Future

Within the opportunity to rebuild the tourism sector in Atlantic Canada is the opportunity for Indigenous tourism to play a key role in finding guests looking for a special (and safe) travel experience.

The strengths of Indigenous tourism in 2019 are expected to be the strengths again in 2021 and beyond but there are two significant unknowns: 1) What will happen in the remainder 2020 until something close to normal travel returns and 2) What new normal will develop that may have a positive or negative impact on Indigenous tourism?

Within the opportunity to rebuild the tourism sector in Atlantic Canada is the opportunity for Indigenous tourism to play a key role in finding guests looking for a special (and safe) travel experience.

Based on the last 25 years of tourism, we can expect tourism to eventually return and to grow beyond the achievements of 2019. However, it can be expected that, for example, the cruise industry will likely experience longer-term challenges and therefore any Indigenous businesses reliant on the cruise industry will need to develop new sources for visitors and industry partnership.

Destinations marketing will develop response programs and businesses should follow closely what their regional, provincial and federal agencies are planning to help rebuild tourism in order for their business to attempt to fully benefit from these COVID-19 economic response plans.

The most successful businesses post-COVID-19, tourism or otherwise, will be those who have spent time considering marketing and business (re)development tactics to identify the type(s) of travelers who

[18] Destination Canada - Aboriginal Tourism US Qualitative Research: Summary of Findings and Considerations – 2017

might be the first to return to their business (drive market and business travellers for example) and assess how to reach them with marketing and sales efforts. Businesses who can adjust their marketing and service delivery to cater to these markets will increase their potential for a quicker recovery and resumption of business flow.

Community-owned tourism businesses are expected to weather this economic storm more effectively due to their support from community ownership. Independent/entrepreneur-owned businesses will be more reliant of various levels of provincial and federal government and government organizations for help if they are eligible.

ACOA's pan-Atlantic tourism development plan will need to be strategically revised to assess and respond to the very unique needs and challenges of 2020.

Indigenous tourism businesses will have an opportunity to thrive in the new world of tourism in 2021 as it is expected that many travellers will be looking for meaningful, custom experiences that help them feel transformed and, to a certain extent, healed from the experiences of the first half of 2020. Indigenous cultural tourism offerings are in a very strong position to offer a special experience all the more relevant and deeply meaningful to visitors.

New Brunswick

Overall Tourism Sector

Tourism is one of New Brunswick's most important industries with annual visitor spending exceeding $1.5 billion, it is one of the top 3 largest service export industries for the province. Tourism contributes more than $520 million annually to the provincial GDP. The tourism share of provincial GDP ranks with the combined share of agriculture, forestry and fishery in New Brunswick's economy.[19]

The Tourism Industry Association of New Brunswick (TIANB) reports that there are more than 12,000 New Brunswickers working directly in the tourism sector and close to 30,000 in tourism-focused industries such as restaurants, hotels, recreation and related services. This represents close to 9% of the province's entire workforce.[20]

The tourism industry in New Brunswick is challenged with a workforce shortage. According to TIANB, tourism operators are struggling to find and hire skilled workers, both seasonal and year long. According to Statistics Canada's latest Job Vacancy Survey in 2018, the accommodation and food services sector and the arts, entertainment and recreation sector have the highest job vacancy rates among the 20 main industry groups across the province. New Brunswick has the third highest job vacancy rate in the accommodation and food services sector among the 10 provinces across Canada.

Research Relevant for Tourism Operators in New Brunswick

The tourism sector generates more than $250 million in tax revenue every year for local, provincial and federal governments. Part of that tax revenue is generated through almost 1.9 million room nights sold

[19] Government of New Brunswick News Release - New Tourism Growth Strategy focuses upon innovation and partnerships – Nov2017 - https://www2.gnb.ca/content/gnb/en/news/news_release.2017.11.1492.html

[20] TIANB News Release – Dec2018 - Ensuring New Brunswick's tourism industry has the workforce it needs - https://www.tianb.com/images/tianb/PDFs/Branded_Workforce_shortages_EN_December_17_2018.pdf

in 2018 at a year-round occupancy level of just over 58% which is the highest of all the Atlantic provinces according to 2018 data released by TIANB.[21]

In 2010, New Brunswick partnered with Destination Canada to work with their Explorer Quotient (EQ) research to identify the best types of customers to target in the province's marketing and development efforts. EQ informs activities within numerous areas at Tourism NB: Marketing, Customer Engagement, Sales and Partnership, Product Development and Research. Focus throughout the Department is placed on understanding what motivates the primary EQ types, and most importantly on why they should choose New Brunswick as a travel destination.

It was identified that their primary targets should be Cultural Explorers, Authentic Experiencers and No-Hassle Travellers.

Cultural Explorers: From the Destination Canada EQ report, Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit. Personality traits: Open, accepting, non-traditional, enthusiastic, creative.

Authentic Experiencers: Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

No-Hassle Travellers: No-Hassle Travellers are typically extroverted, flashy people who seek secure group travel, allowing them to be pampered in luxurious surroundings while seeing all the main sights of a destination. They search for relaxation and simplicity and favour worry-free travel and spending time with family and friends. Short breaks and getaways are preferred to long-distance travel. Things are rarely planned and they hope to experience the beauty of natural scenery and different cultures.

Expectations Moving Forward – Looking Towards the Future

In November 2017, the government of New Brunswick announced the New Brunswick Tourism Growth Strategy: New Tourism Economy. Tourism has been identified as a key opportunity for growth in the New Brunswick Economic Growth Plan.[22]

According to the New Brunswick department of Tourism, Heritage and Culture, as a result of this strategy, New Brunswick aims to increase visitor spending by 57 per cent over 2016 levels by 2025. This would represent an additional $133 million in provincial tax revenue and lead to the creation of up to 4,800 new jobs in the tourism sector. The strategy focuses on five main pillars:

1. Elevation of Tourism Economic Stature – raise awareness and appreciation of the economic importance of tourism as a key sector of the New Brunswick economy.
2. Research, Technology and Performance Metrics – establish innovative tourism leading practices in research, technology and performance metrics.
3. Product and Experience Innovation – develop world-class products and experiences that will achieve visitation and revenue goals in identified markets.
4. Advance Partnership Investment and Alignment – align partnership investment to foster product innovation, entrepreneurship and market development.
5. Brand and Market Ownership – develop a generational brand resulting in increased visitor spending to New Brunswick from identified markets.

[21] Government of New Brunswick Research – 2018 Tourism Indicators - https://www2.gnb.ca/content/dam/gnb/Departments/thc-tpc/pdf/RSP/Indicators_Indicateurs/IndicateursDuTourisme2018TourismIndicators.pdf
[22] New Brunswick Department of Tourism, Heritage & Culture – Tourism Growth Strategy – 2017 - https://www2.gnb.ca/content/dam/gnb/Departments/thc-tpc/pdf/Publications/TourismGrowthStrategy20182025.pdf

With the arrival of the COVID-19 pandemic, the goals of this strategy, as well as the pillars, will need to be reconsidered within the new reality of recovering from the significant and widespread economic impacts experienced in the province to both the suppliers of tourism experiences as well as to future travellers and their personal economic reality and how that relates to future travel plans and decisions.

On Apr. 1, 2020, TIANB released their findings of their first COVID-19 survey with tourism operators to determine the impact of COVID-19. More than 150 tourism operators responded to the survey that ran from Mar. 16 to 22, 2020. The responses received were from a wide range of types of tourism businesses. Over 60% of the responses indicted they are feeling a "massive negative impact" on their business now and expected over the next three months. The sources of the impact are primarily from cancellations and reduced sales as well as event cancellations and cruise industry cancellations of ships into St. John Harbour. Operators are experiencing very difficult cash-flow challenges.[23]

On Apr. 13, 2020, TIANB released updated findings which indicated that over 20% of respondents saw a 50% or more decrease in the revenues in the first three months of 2020 as compared to 2019. Three percent of respondents have closed permanently and over 50% of businesses have closed temporarily. Almost 50% of the survey respondents show that they have laid off over 75% of their staff due to COVID-19 impacts.

It is expected that the domestic 'driving market' will be one of the first tourism flows to resume once travel reopens. New Brunswick tourism operators will benefit from the fact that there are 14 million people within a one-day drive of NB borders, and 64 million more within a two-day drive. According to the NB Tourism Growth Strategy, this 'driving market' is enormous in size and opportunity.

The new Tourism Growth Strategy also highlights the importance of the resident market – not just as vacationers themselves, but as proud ambassadors of the province. This will be even more important in the months ahead in tourism industry recovery.

The Tourism Growth Strategy also highlights the importance to the province of product innovation: to build on and rejuvenate the provinces greatest strengths. Innovated, immersive, differentiated products and experiences will be even more essential to drive interest, and ultimately visitation and spending, in New Brunswick.

Indigenous Tourism

In 2016, Statistics Canada reports that there were 29,380 Indigenous people in New Brunswick, making up 4.0% of the population with 60% identifying as First Nations people and 35% Métis with the remaining 5% Inuit. 61% of the Indigenous population reported living in a rural location and 59% reported living on reserve. The average age of the Indigenous population in New Brunswick was 35.5 years, compared with 43.4 years for the non-Indigenous population in the province. The 2016 census showed that the largest age group for non-Indigenous in the province is 65 and over (19.3%) while the largest age group for Indigenous is 0 to 14 (23.1%) showing the significant difference in age distribution between Indigenous and non-Indigenous.[24]

In the 2018 research completed by the Conference Board of Canada, Indigenous tourism in New Brunswick attracted just over $71 million in revenues in 2018, second only to Newfound & Labrador in Atlantic Canada. The Indigenous tourism industry in the province employs 829 people earning $16.5 million in wages and contributing $24.3 million in GDP for the province.

The Indigenous tourism supply is growing in New Brunswick. According to the Conference Board of Canada, between 2014 and 2018, the number of Indigenous tourism businesses increased by 9% from 47 businesses in 2014 to 51 businesses in 2018. New Brunswick's 51 Indigenous-owned tourism

[23] TIANB YouTube Channel - https://www.youtube.com/channel/UCCAvy4lTZJsTjokdLNEQUJg
[24] Statistics Canada – 2016 Census - https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-pr-eng.cfm?LANG=Eng&GK=PR&GC=13&TOPIC=9

businesses in the province are second to only Newfoundland & Labrador in terms of total number of businesses. This number of businesses represents almost 27% of all Indigenous-owned tourism businesses in Atlantic Canada and 3% of all Indigenous tourism businesses in Canada.

The majority of the businesses are in the Arts & Heritage sector and the Food & Beverage sector. The province has six of the seven reported Indigenous-owned gaming attractions in Atlantic Canada. As compared to the other Atlantic provinces, New Brunswick has relatively few accommodation businesses (two) and travel service businesses (seven) in comparison to the rest of the region.[25]

The Indigenous Tourism Association of New Brunswick (ITANB) has launched their organization in 2018. They are a non-profit, stakeholder-based organization and the province's first and only dedicated Indigenous tourism organization. Through product development and marketing of authentic Indigenous experiences, ITANB is working to create a platform for Indigenous cultural expression and preservation through tourism. The organization focuses on uniting communities, Indigenous organizations and industry leaders to support the growth and promotion of a sustainable, culturally rich Indigenous tourism in the province. ITANB represent the Mi'kmaq, Wolastoq, Passamaquoddy of NB. Their seven-person Board was formed to mobilize the 15 First Nations in New Brunswick and to bring tourism development within its communities to the forefront.[26]

The organization also provides industry advocacy. ITANB representatives attend tourism events to speak on behalf of the needs and challenges of Indigenous tourism operators. Recent events include the International Indigenous Tourism Conference, the TIANB Tourism Town Hall, the Atlantic Indigenous Tourism Summit and ITAC Board Meetings.[27]

In terms of Indigenous tourism marketing and building awareness, ITANB currently has a website and Facebook page which shares information regarding Indigenous tourism businesses and activities in New Brunswick. The new organization also works with keys partners such as TIANB and Tourism NB with the purpose of establishing collaborative partnerships aiming to promote and develop Indigenous tourism in New Brunswick.

The Indigenous Tourism Association of Canada (ITAC) shows, in their online membership listings, there are three voting members from New Brunswick: Elsipogtog Mi'kmaq Cultural Center, Metepenagiag Heritage Park, Metepenagian Lodge. Patricia Dunnet, the General Manager at Metepenagjag Heritage Park is the current provincial representative for NB on the ITAC Board of Directors. Non-voting members are: Birch Canoe Resort, Mawi'Art: Wabanaki Artist Collective, Micmac Native Arts, Pauline Young ART, SP First Nations Outdoor Tours and Tobique First Nation.[28]

With the COVID-19 pandemic, the short-term future for Indigenous tourism in New Brunswick is very uncertain. As a member of the Pan-Atlantic Indigenous tourism group, ITANB is in a position to help guide, direct, support and promote Indigenous tourism in the province.

The province will feel the longer-term effects of a struggling cruise industry. For 2020, Port Saint John reported that they expected a best-ever cruise season in 2020 with over 90 vessel calls from 15 different lines, the schedule was on track to break the 200,000-passenger record set in 2010. The schedule boasted eight triple ship days, eight double ship days and 11 inaugural calls.[29]

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[25] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

[26] Indigenous Tourism Association of New Brunswick website - http://www.itanb.ca/

[27] Indigenous Tourism Association of New Brunswick Facebook page - https://www.facebook.com/IndigenousTourismNB/

[28] ITAC membership webpage - https://indigenoustourism.ca/corporate/member-directory/

[29] Port Saint John News Release Jan2020 - https://www.sjport.com/record-breaking-2020-cruise-schedule-released-at-port-saint-john/

Each year, prior to COVID-19, the province welcomed more than 240,000 cruise guests (passengers and crew) which represents an annual $49.9 million boost to New Brunswick's economy according to the Atlantic Canada Cruise Association including direct spending by cruise lines, passengers, and crew in New Brunswick of $21.5 million.[30] The 2018 season included 75 scheduled cruise ship calls into Port Saint John. Businesses will need to adjust their target audience for visitors in the absence of cruise passengers in 2020 and reduction in volumes in 2021 and beyond.

The domestic 'drive-market' tourists will likely return first to travel and Indigenous businesses should look to promote their offerings through communication channels specifically successful with the domestic and regional traveller.

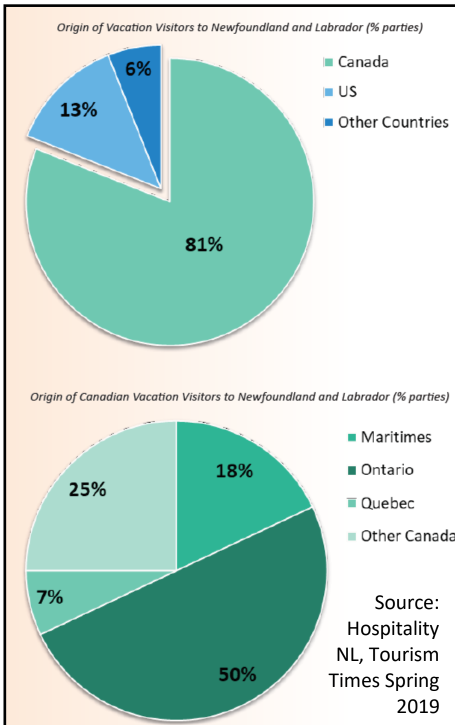
International travellers will return but not as quickly or with the same volume as the regional traveller. The international traveller has been shown by Destination Canada to have a higher interest in indigenous cultural experiences than the domestic traveller. It will be important to reach out to international travellers through export channels and travel trade however their return will likely be minimal in 2021 but return more strongly in 2022.

Indigenous tourism businesses should expect direction, support and guidance in this challenging future ahead with NB partnerships such as JEDI-NB, Tourism NB and ITANB.

Newfoundland & Labrador

Overall Tourism Sector

In 2018, Newfoundland & Labrador saw very strong economic results. According to Hospitality NL, the province has 2,700 tourism-related businesses, 20,000 provincial jobs in tourism industries, over 550,000 annual visitors and $1.13 billion in annual tourism spending. NL bases its tourism promotion around experiences for travellers that are rooted in their storied history, their distinct culture and environment and their very welcoming locals.[31]



Source: Hospitality NL, Tourism Times Spring 2019

The Economic Growth Strategy for NL identifies tourism as one of the priority sectors with the potential to significantly impact NL's economy.

Research Relevant for Tourism Operators in Newfoundland & Labrador

The tourism sector in NL attracts over half a million visitors to the province each year with almost 475,000 of those visitors coming from within Canada representing 89% of the total visitation leaving 11% of visitors who are from outside of Canada.

Hospitality NL reported in 2019 of vacation travellers (excludes business and corporate events) that 81% of visitors come from Canada and 19% from outside of Canada with 13% from the US and 6% from other countries.

Of the travellers to NL who come from Canada, HNL reports that half of them are from Ontario with 18% coming from the Maritimes, 7% from Quebec and the remaining 25% from other parts of Canada.

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[30] Atlantic Canada Cruise Association - The Economic Contribution of the International Cruise Industry in Canada 2016 - http://clia-nwc.com/wp-content/uploads/2017/06/Canadian-Economic-Impact-Analysis-2016.pdf
[31] Hospitality Newfoundland & Labrador Annual Report – 2018 - https://hnl.ca/wp-content/uploads/2019/02/2018-Annual-Report-PDF.pdf

Canadian vacationers stay an average of 10.4 nights in the province. Compared to other markets, Canadians stay slightly longer than US visitors (10.0 nights) and slightly shorter than international visitors (10.9 nights). During their vacation, the Canadian visitors spend an average $3,417 per travel party, similar to international vacation visitors ($3,446) and slightly less than US vacationers ($3,818). By provincial origin, visitors from Ontario spend the most at $3,750. During their visit, Canadian vacationers are most likely to stay in hotels/motels and B&Bs, with the largest share of their money (42%) spent in the province on accommodations.[32]

NL sold 1.4 million rooms in 2018 out of a possible 3 million room nights available over the entire year resulting in an average occupancy of 46%. This average occupancy is the lowest in Atlantic Canada with the average at 53% and New Brunswick the highest at 58%.

Key trip elements or activities for Canadian visitors are pleasure walking, hiking, visiting historic sites, exploring communities and lighthouses, enjoying local cuisine, visiting national parks, browsing art galleries, and seabird and whale watching.[33]

From a demographic perspective, a majority of overall visitors are aged 55 or older, affluent, and well-educated – and Canadian vacationers are no exception: 60% are 55 or older, nearly 80% have post-secondary education and close to half report household incomes of $100,000 or more. Working with Environics Analytics and based on Destination Canada's explorer quotient (EQ) traveller profiles, Newfoundland and Labrador Tourism has identified two key types of visitors to Newfoundland and Labrador – Authentic Experiencers and Rejuvenators.

Authentic Experiencers: Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

Rejuvenators: Rejuvenators are family-oriented people who travel with others to escape from the stresses of everyday life to get pampered and indulge themselves. Their most appealing activities are viewing wildlife and natural scenery and tend to stay on vacation for a slightly shorter duration than the average Canadian likely reflecting their preference for shorter get-aways.

Expectations Moving Forward – Looking Towards the Future

The Economic Growth Strategy for Newfoundland & Labrador released in February, 2019 identifies tourism as one of the five "high potential priority sectors" for economic growth for the province's economy. The strategy indicates "An exceptionally promising tourism sector, coupled with the growing global interest in visiting Canada, positions Newfoundland and Labrador for growth."

Prior to the arrival and impact of COVID-19, the province saw tourism as a significant opportunity to accelerate growth through 2030; if Newfoundland and Labrador could match the national target growth rate of 6.4% for non-resident tourism expenditure, the sector could nearly double in size. The Economic Growth Strategy recommended the following initiatives to realize substantial opportunity for growth through tourism:

- Select high-potential destinations for targeted product growth initiatives, building on the existing regional destination development plans and including attraction of external capital and expertise.
- Attract foreign investment and private sector interest to enable the Province to develop new properties, attractions, and tourism infrastructure as sites become more popular.
- Improve tourism infrastructure to reduce capacity constraints, especially in terms of accommodation, local transportation links, and non-stop air links with major North American hubs.
- Invest in training programs that prepare the workforce for an increasingly professionalized and quickly growing tourism sector.

[32] Hospitality NL Tourism Times – Spring 2019 - https://issuu.com/hospitalitynl/docs/tt_spring_2019

[33] Hospitality NL Tourism Times – Spring 2019

These initiatives should not be entirely shelved due to the impact of COVID-19. It is expected that interim tourism recovery priorities and programs will be initiated in NL in order to regain some stability allowing the specifics of the Economic Growth Strategy to be somewhat revised and restarted.

Much like New Brunswick, Newfoundland & Labrador should initially refocus on the domestic market as it is seen to likely be one of the first tourism flows to resume once travel reopens. Although NL is the most remote of the four Atlantic provinces, it has major international airports, ferry services and road access to Labrador. The remoteness of the province may cause NL to begin receiving visitors on a more delayed schedule than the other Atlantic provinces. NL will need to target their marketing and promotional messaging to attempt to overcome a more remote location compared to other Maritime travel options in eastern Canada.

In 2019, 38 cruise ships visited the Port of St. John's carrying over 40,000 passengers plus cruise ship crew members. A variety of cruise lines include St. John's as both a home port and in-transit port of call. St. John's has become a home port for cruise ships on a variety of itineraries that cruise Newfoundland and Labrador and the Canadian North. As well, St. John's is a regular port-of-call for cruise vessels on itineraries travelling North Atlantic, transatlantic and northeastern seaboard routes.[34] This traffic will significantly decrease or potentially disappear in 2020 with a very uncertain future for the cruise industry which will impact St. John's tourism visitation and revenues.

Indigenous Tourism

Three per cent of Canada's Indigenous population lives in Newfoundland and Labrador, which is 36,000 people, and six per cent of the provinces' total population. Newfoundland & Labrador is the ancestral home of distinct Indigenous cultures, each with its own history, language, beliefs, and traditions including the Labrador Inuit, NunatuKavummiut, Innu, and Newfoundland Mi'Kmaq.[35]

ITAC research in 2018 indicates that Indigenous tourism employs over 1,000 people in Newfoundland and Labrador earning over $33 million in wages and salaries and adding $47.6 million to the provincial GDP. NL is the highest province in Atlantic Canada in terms of Indigenous tourism jobs, labour income, GDP and industry revenues.

The Indigenous tourism supply is growing in NL. According to the Conference Board of Canada, between 2014 and 2018, the number of Indigenous tourism businesses increased by 71% from 47 businesses in 2014 to 72 businesses in 2018. In the 2018 research, NL's Indigenous tourism industry brings in $95.2 million in revenues with 72 Indigenous tourism operators, also the highest of any of the Atlantic provinces. NL's Indigenous tourism businesses are primarily Arts & Heritage (29% of businesses) and Accommodation (26%) with just two businesses in the Recreation and Outdoor Adventure category.[36]

In 2019, the Newfoundland & Labrador Indigenous Tourism Association (NLITA) was launched and announced at the annual Hospitality NL Conference and Trade Show. NLITA is an Indigenous-led group looking to maximize Indigenous tourism potential in NL. According to NLITA, this Indigenous tourism association for Newfoundland and Labrador has been designed to support its industry members through "strong regional, provincial, and national partnerships to provide meaningful benefits for the Indigenous communities across the province, setting direction for expansion and prosperity in order to create dynamic tourism offerings, and provide a powerful voice to promote these products to the world."[37] The organization has released an inaugural 5-year strategy 2019-2024. This collaborative 5-Year Strategy was initiated by the Newfoundland and Labrador Indigenous Tourism Working Group towards their vision to

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[34] Port of St. John's website: http://www.stjohns.ca/visiting-our-city/cruise-information

[35] Statistics Canada – 2016 Census - https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-PR-Eng.cfm?TOPIC=9&LANG=Eng&GK=PR&GC=10

[36] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

[37] NLITA website: https://www.nlita.net/about

"preserve and promote Indigenous culture, knowledge and places in Newfoundland & Labrador through leadership."[38]

The NLITA strategy has identified 9 strategic directions through their grassroots approach to tourism development:

1. Grassroots Tourism Support
2. Cultural Preservation
3. Indigenous Inclusion
4. Governance & Leadership
5. Marketing & Branding
6. Product Development
7. Partnership Development
8. Education & Awareness
9. Capacity Building & Training.

These key strategic priorities for NLITA were developed to guide the organization, its projects, activities and initiatives.

In order to effectively represent Indigenous tourism in NL, NLITA will develop an Elder Advisory Council for fundamental guidance and integrity. Also, Indigenous tourism champions who represent the province will be identified and invited to participate in NLITA's organizational activities. These individuals will provide leadership at the local community level.

The Indigenous Tourism Association of Canada (ITAC) shows, in their online membership listings, there are 15 voting members and seven non-voting members from NL. The 15 voting members is the fourth highest province in Canada and highest amount for the Atlantic provinces.[39] Tara Saunders, the Tourism Development Officer for the Qalipu First Nation, is the current provincial representative for NL on the ITAC Board of Directors and is the Chair of the NL Indigenous Tourism Association.

The short-term future for Indigenous tourism in Newfoundland & Labrador is very uncertain. The province will feel the longer-term effects of a struggling cruise industry and an expected steep drop in international arrivals. Businesses will need to adjust their target audience for visitors in the absence of cruise passengers and overseas guests in 2020 and reduction in volumes in 2021 and beyond.

Indigenous tourism operators should be aware that the domestic drive-market tourists will likely return first to travelling and operators should look to promote their offerings through communication channels specifically successful with the domestic and regional traveller.

As is the case with the other Atlantic provinces, International travellers will return but not as quickly or with the same volume as the regional traveller. The international traveller has been shown by Destination Canada to have a higher interest in indigenous cultural experiences than the domestic traveller. It will be important to reach out to international travellers through export channels and travel trade however their return will likely be minimal in 2021 but return more strongly in 2022.

Partnerships with HNL, Tourism NL and ITANL and its new strategy will help direct, support and guide Indigenous tourism operators in this challenging future ahead.

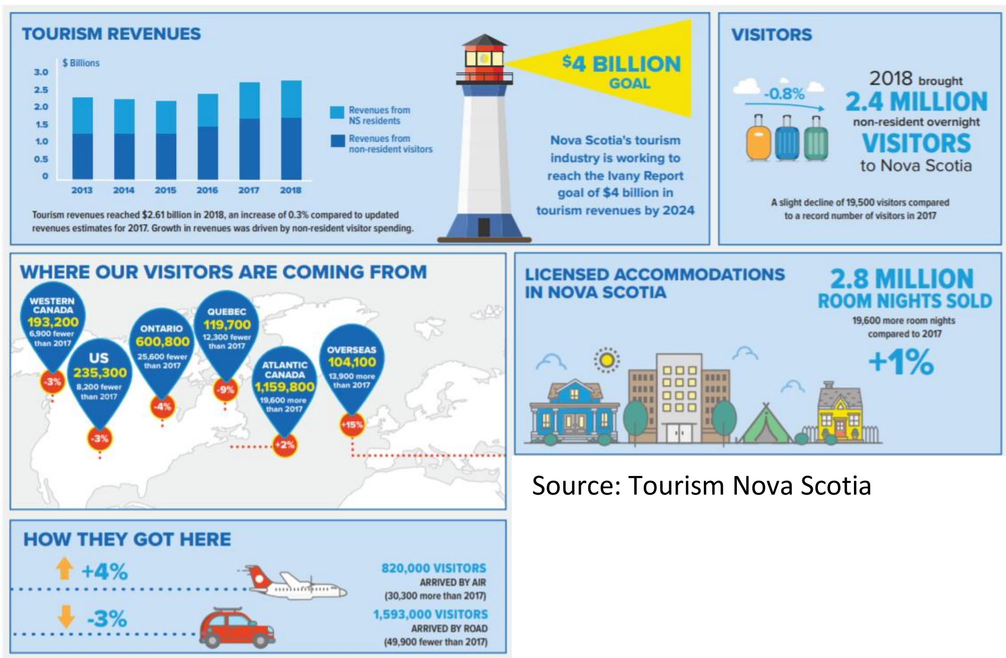
[38] NLITA 5-Year Strategy: https://1414c6c9-4ede-40d6-aa61-648393c0d616.filesusr.com/ugd/1dd051_b0ffbf352227419e8daa903c54730dee.pdf

[39] ITAC membership webpage - https://indigenoustourism.ca/corporate/member-directory/

Nova Scotia

Overall Tourism Sector

In the infographic below from Tourism Nova Scotia, we can see the key performance data for 2018. Tourism earned $2.6 billion in overall revenues, the highest of any of the Atlantic provinces. Nova Scotia also leads the region in attracting 2.4 million visitors in 2018 (a slight decline from 2017) and 2.8 million room nights sold out of a total of 5 million room nights available resulting in a 55% average accommodations occupancy level.[40]



Source: Tourism Nova Scotia

In 2014, the Nova Scotia Commission on Building our New Economy conducted research and held public consultations across Nova Scotia. The Commission published a report called "Now or Never: An Urgent Call to Action for Nova Scotians." One of the main messages in the report is that Nova Scotians must stop relying on government. The report challenged a number of sectors in the province to take action. The goal for Nova Scotia's tourism sector states: Goal #14: Tourism Expansion - As Nova Scotia's leading source of service sector exports, gross business revenues from tourism will reach **$4 billion by 2024**.[41]

Tourism Nova Scotia's strategic plan, Driving Export Revenue 2018-2023, outlines how Tourism Nova Scotia will help lead the industry to achieve the goal to reach $4 billion in annual tourism revenues by 2024. The pillars of Tourism Nova Scotia's strategy: 1) attract first-time visitors; 2) invest in markets of highest return; 3) focus on world-class experiences; and 4) build tourism confidence.[42]

Research Relevant for Tourism Operators in Nova Scotia

Restaurants (19%), accommodations (17%) and shopping (11%) are three of the top five sectors within tourism that attract tourism revenues according to Tourism Nova Scotia. The remaining two of the top five are related to transportation providers and vehicle operation (fuel purchase, repairs etc.).

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[40] Tourism NS – 2018 Tourism Indicators - https://tourismns.ca/research/tourism-statistics/2018-tourism-performance

[41] Nova Scotia Commission on Building our New Economy – Now or Never: An Urgent Call to Action for Nova Scotians - https://onens.ca/img/now-or-never.pdf

[42] Tourism Nova Scotia – Driving Export Revenue - https://tourismns.ca/sites/default/files/Driving%20Export%20Revenue%20-%20Strategic%20Plan.pdf

Of the 2.4 million overnight visitors to Nova Scotia in 2018, 820,000 (34%) of them arrived by air which was a 4% increase over the previous year. 1.59 million visitors 66% arrived by road which was a 3% decrease from 2017.[43]

Almost 50% of visitors to Nova Scotia primarily come from within Atlantic Canada (48%). Visitors from the rest of Canada represent 38% of all visitors to the province with Ontario representing the largest point of origin within Canada but outside of Atlantic Canada with just over 600,000 visitors or 25% of all visitors. Visitors from the US represent 10% of visitors to Nova Scotia but decreased by 3% in 2018 (after increasing each year since 2013) while visitors from overseas represent just 4% of all visitors however the volume of overseas visitors increased by 15% in 2018 as compared to the previous year.

A large majority of tourism revenues in Nova Scotia are earned within three of the seven regions of the province with Halifax-Metro earning 53%, Bay of Fundy & Annapolis Valley earning 15% and Cape Breton earning 12% for a total of 80% of the total tourism revenues spent in these three regions.

The passenger cruise industry is also important to Nova Scotia, particularly Halifax. 2019 was the fifth consecutive year of cruise industry growth. As compared to 2015, Halifax received over 100,000 more cruise passengers in 2019 which is almost a 50% growth over a four-year period for a total of 323,709 cruise passengers arriving on 179 cruise vessels. In 2020, Halifax was scheduled to once again exceed the previous year's passenger total.[44]

Expectations Moving Forward – Looking Towards the Future

The Driving Export Revenue strategy designed to grow tourism results in Nova Scotia indicates that based on 2017 data and growth trends and a consistent trajectory, tourism revenues will reach $3.2 billion by 2024. The strategy has a goal of $4 billion by 2024 and states that in order to reach the $4 billion goal, the rate of growth must increase, and that current visitor composition will need to shift to include more high-value visitors.[45]

In 2019, the Tourism Industry Association of Nova Scotia reported that higher-spending visitors drive Nova Scotia's tourism revenue growth. Growth in revenues from non-resident visitors has outpaced growth in volume of non-resident visitation, demonstrating that each visitor is spending a higher amount per visit and therefore Nova Scotia is successfully attracting more higher-spending visitors.[46]

The Tourism Nova Scotia strategy also identifies some key challenges to address which can also help operators make decisions on investment and growth. Key challenges relevant to operators include:

- Accommodations: Nova Scotia lacks both the supply and quality of accommodations needed to meet visitor demand.
- Labour shortage: The availability of employees continues to be problematic.
- Seasonality: Currently, Nova Scotia's peak tourism season is June to October. For many operators, the seasonal nature creates challenges relating to labour attraction and retention, and the short season limits profitability.
- Market-ready: Some operators and the industry as a whole are not always prepared to meet the expectations of potential visitors, including quality of facilities and services, range of services provided, information services, business policies and other practices that directly or indirectly affect the visitor experience.
- Trade-ready: Some operators lack the advanced level of preparedness necessary to actively seek out and accommodate travel trade business. Many businesses are not equipped to market via the travel trade because of a lack of understanding of the distribution system and its requirements.[47]

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[43] Tourism Nova Scotia – 2018 Tourism Indicators

[44] Cruise Halifax – Cruise Statistics - https://www.cruisehalifax.ca/our-visitors/statistics/

[45] Tourism Nova Scotia – Driving Export Revenue

[46] TIANS – National Advocacy webpage: https://www.tians.org/leadership/national-advocacy

[47] Tourism Nova Scotia – Driving Export Revenue

The tourism industry organizations in Nova Scotia are responding to the COVID-19 pandemic. Tourism Nova Scotia have indicated to their stakeholders that they are in close communication with Destination Canada, their in-market representatives, and their industry partners to help with a coordinated response to tourism impacts. They are also making adjustments to their marketing strategies and programming as required while pulling together information from tourism industry partners and public health officials on new developments related to the tourism sector. Their corporate/industry site has updates on support for tourism operators at: https://tourismns.ca/coronavirus

In an effort to keep tourism operators and stakeholders informed, TIANS has launched an information hub dedicated to COVID-19 with a focus on the information relevant to your tourism business needs: https://tourismstrong.ca/. The dedicated website provides resources and updates for tourism operators through the new Tourism Strong digital hub including timely and relevant Industry news, government supports, research, health & wellness, and rebuilding into the future. Additional links, blogs from Industry leaders, news and tools will be added as they become available. The links include listings of support agency support programs and a media scan listing relevant tourism articles.

Nova Scotia is not heavily dependent on International travellers and it is expected Tourism NS will initially market towards regional and domestic travellers in order to recover once travel returns. The regional drive market will be a critical primary target market for almost all tourism businesses in the short-term.

The delay and potential cancellation of the cruise industry in 2020 will have significant impact on the province and Halifax. The cruise industry represents over 300,000 guests including arrivals in the fall shoulder season extending tourism activity into October and November.

Indigenous Tourism

In 2016, there were 51,495 Indigenous people in Nova Scotia, making up 5.7% of the population according to Statistics Canada. Three in ten (29%) Indigenous people in Nova Scotia resided in Halifax, representing 3% of the total population living there. Cape Breton had the province's highest proportion of Aboriginal people at 6%. Approximately 60% of Indigenous people aged 25 to 64 in Nova Scotia had a certificate, diploma or degree from a trade school, college or university.[48]

According to the Conference Board of Canada, between 2014 and 2018, the number of Indigenous tourism businesses decreased by 24% from 38 businesses in 2014 to 29 businesses in 2018. Nova Scotia is the only Atlantic province to have decreased their number of Indigenous tourism businesses from 2014 to 2018. In a comparison of business lists from 2014 to 2018, it appears that many of the businesses who are no longer currently in businesses are craft and gift shops. Almost half of the 29 Indigenous tourism businesses in 2018 are in the Arts & Heritage sector of tourism. The second highest sector of Indigenous tourism businesses in the province is Travel Services which includes retail and gas stations with 26% of the total businesses. Nova Scotia has a very limited number of Indigenous-owned outdoor adventure businesses. Nova Scotia has a limited number of Indigenous-owned accommodation providers (just one in the province) and food and beverage businesses (just 3 in the province). Overall, in Canada, accommodations and food & beverage businesses make up 26% of the Indigenous tourism businesses; in Nova Scotia those businesses make up just 13%.[49]

The Indigenous tourism research in 2018 completed by the Conference Board of Canada also indicates that Indigenous tourism in Nova Scotia attracted $51.4 million in revenues and represents 876 jobs, $23 million in labour income and $31.6 million in provincial GDP. These numbers demonstrate the economic importance of Indigenous tourism in the province.

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[48] Statistics Canada – 2016 Census - https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-PR-Eng.cfm?TOPIC=9&LANG=Eng&GK=PR&GC=12

[49] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

As an example of future Indigenous tourism product development, the Mi'kmawey Debert Cultural Centre (MDCC) is being developed and, according to their website will be a “meaningful and dynamic centre for Mi'kmaw people, and for visitors from across Nova Scotia, Canada and the world”. Currently in the planning stages, the Centre will be built in Debert, Nova Scotia. The MDCC project is a charitable, not-for-profit First Nations organization, mandated by all thirteen Nova Scotia Mi'kmaw Chiefs. The project is administered through The Confederacy of Mainland Mi'kmaq, a First Nation tribal council. The MDCC became incorporated as a society in 2001 and gained charitable status as an organization in 2002.[50]

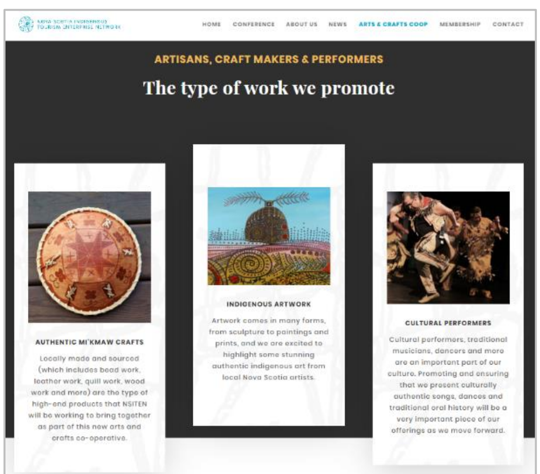
The Nova Scotia Indigenous Tourism Enterprise Network (NSITEN) was formed in 2017 and is a volunteer based, not for profit cultural tourism organization that develops specific project-based training aimed at growing the capacity of Indigenous individuals, businesses and community lead tourism initiatives. NSITEN is a member-based organization and their voting members are made up of new and existing Indigenous artists, crafters, traditional knowledge keepers and band enterprises. Membership criteria includes having a valid Indian Status Card as recognized by the national Indigenous organizations of Canada.

NOVA SCOTIA INDIGENOUS TOURISM ENTERPRISE NETWORK

The NSITEN website explains that NSITEN is also a Mi'kmaw word meaning “Understand” and their organization is focused on sharing a path towards the process of creating understanding through the cultural knowledge transition they see possible through tourism.[51]

NSITEN has initiated a program called "Arts & Crafts Co-op” where they will be offering a free service to all artists, artisans, craft makers and traditional knowledge keepers as a way to grow opportunities and also to start organizing a collective database of individuals & businesses that would like to have more support services that would benefit their future goals and aspirations. NSITEN plans on organizing events that will bring them together to gather information and enhancing skill sets that will allow them the ability to better participate in the mainstream cultural tourism industry.[52]

NSITEN has not yet released an organizational strategy or business plan however their website indicates that they will “continue with the development & discussions on an Atlantic Indigenous Tourism organization that will work to provide collective support services for all Provincial Atlantic Indigenous tourism organizations to solidify a long term strategy and investment plan to help provide an authentic offering.”



Sample page from NSITEN website promoting various forms of Indigenous tourism in NS. https://www.nsiten.com/arts-crafts-coop/

Their organization is also working on developing an updated business database of existing business owners involved in cultural tourism in the Nova Scotia Region. They also host regional tourism sessions that focus on educating more people on topics related to the organization and opportunities to get involved in the cultural and mainstream tourism in Nova Scotia. NSITEN hosted a provincial summit on Indigenous tourism in 2019 to bring together all key components of the tourism industry partners, businesses, individuals interested in starting a business. They are planning on a 2020 Summit however the initial date of May 2020 has been postponed to later in the year.

[50] Mi'kmawey Debert Cultural Centre website: www.mikmaweydebert.com

[51] NSITEN About webpage: https://www.nsiten.com/about/

[52] NSITEN Arts & Crafts Program webpage: https://www.nsiten.com/arts-crafts-coop/

The Indigenous Tourism Association of Canada (ITAC) shows, in their online membership listings, there are three voting members from Nova Scotia: Destination Membertou, Kluskap Ridge Rv & Campground Ltd., Wagmatcook Centre & Heritage Centre. Darrell Bernard owns and operates Kluskap Ridge RV & Campground with his wife Sharon and Darrell is the current provincial representative for Nova Scotia on the ITAC Board of Directors. Non-voting members are: Cabot Links, Destination Cape Breton Association, Mi'kmawew Debert Cultural Centre, Mikmaq Artist – Loretta Gould, Paqtnkek Mi'kmaw Nation and the Tourism Industry Association of Nova Scotia.[53]

The future for Indigenous tourism in Nova Scotia appeared very strong with growth opportunities and a new organization supporting Indigenous tourism businesses towards sustainability and success. The 2016 Culture Index Survey completed as part of Nova Scotia's Culture Action Plan indicates that 76% say culture helps connect people from different communities and backgrounds. This represents a very significant part of Indigenous tourism and its potential in Nova Scotia.

Indigenous tourism, as tourism returns and recovers, should focus on key opportunities in Nova Scotia including increasing certain types of Indigenous tourism business development. For example, Nova Scotia leads the Atlantic region in tourism however Indigenous tourism does not. In particular, restaurants and accommodations are the top two sectors within mainstream tourism for earning revenues in the province however Nova Scotia has a very limited number of Indigenous-owned businesses in those two sectors.

Nova Scotia appears to have significant upside potential for growth. Nova Scotia has the largest revenues in the overall tourism sector in the Atlantic Region. However, Nova Scotia falls behind both New Brunswick and Newfoundland & Labrador in terms of number of Indigenous tourism businesses and revenues. This suggests that within the entire Atlantic Region, Nova Scotia has the greatest upside potential to grow the volume of Indigenous tourism businesses within this province that receives higher overall tourism volumes than the other provinces in the region.

Similar to the other Atlantic provinces, Indigenous tourism in Nova Scotia will need to respond to the COVID-19 reality of a significant drop in international travellers and cruise traffic and focus efforts on the regional drive traffic while offering experiences that celebrate Nova Scotia's heritage and natural settings targeting the regional drive market.

Regional, provincial and federal organizations will offer support and collaborative partnerships with these organizations will be extremely important to Indigenous tourism businesses in order to find opportunities to rebuild and recover from the COVID-19 impact.

Prince Edward Island

Overall Tourism Sector

With an estimated 1.58 million visitors, 2018 marked the fifth consecutive record year for tourism on the Island. For the second year in a row, Prince Edward Island eclipsed one million overnight stays. Tourism revenue grew an impressive 5.7% to $486 million in 2018 with over 320 new licensed accommodation providers entering the market in 2018.[54]

The Tourism Industry Association of PEI reported that of the 1.01 million overnight visitors in PEI in 2018, just over 900,000 of them were from within Canada (89%). Of

[5353] ITAC membership webpage - https://indigenoustourism.ca/corporate/member-directory/
[54] Tourism PEI Annual Report 2018-19 - https://www.princeedwardisland.ca/sites/default/files/publications/2018-2019_tourism_pei_annual_report_0.pdf

the total 1.4 million room nights available for booking in 2018, PEI sold over 668,000 room nights for an average occupancy of 46.4% The average occupancy in Atlantic Canada in 2018 was 52.6%.[55]

Although PEI has the smallest number of tourism businesses in Atlantic Canada, the tourism industry now exceeds the provincial fisheries industry. PEI succeeds in inspiring spending by their visitors as demonstrated by the fact that, according to the Tourism PEI, the province averaged $480 in total tourism spending in the province per overnight visitor in 2018 which compares very well to Nova Scotia at $109 and Newfoundland and Labrador at $211.

Research Relevant for Tourism Operators in Prince Edward Island

According to Tourism PEI, the total overnight visitors to PEI in 2019 was 1,031,513, a 1.7% increase from 2018. Almost 90% of travellers in PEI are Canadian with just 3% from overseas. Overall, international guest volume decreased by 3% with the biggest drop in visitors from China at over 25% from 2018. There were increased numbers of visitors from Germany and the US as compared to the previous year. Gains in the US target market came primarily from the south and the Midwest as well as a 7%+ increase from New England. Growth in visitors from Canada grew slightly with a decrease in visitors from within Atlantic Canada and an 11%+ increase of visitors from provinces west of Ontario.

Cruise passengers into PEI was up 29% in 2019 as compared to the previous year with 183,592 cruise visitors to Charlottetown in 2019 with visitors from May to November. The largest volumes of cruise passengers arrive in September and October.

Visitation to provincial heritage sites in 2019 were up 12% with 89,705 total visitors to seven sites across the province.

Hotel occupancy rates in Charlottetown were at 50.5% in 2019 with 350,234 room nights sold which is just over 50% of the provincial total room nights sold for the year. All other regions of PEI experienced 45% occupancy rate or less in 2019 including the lowest regional rate of 32% in the Red Sands region.

Campgrounds in PEI achieved 48% occupancy in 2019 with 707,793 site-nights available during the camping season which runs from May to October with the busiest months in July and August. This occupancy level has remained stable over the past three years in the province.[56]

Expectations Moving Forward – Looking Towards the Future

In January 2020, Tourism PEI announced that they had begun the process of developing a new five-year tourism strategy for the province.[57] In some ways it is fortunate that the process had just begun as the COVID-19 pandemic arrived in Canada. The strategy, to be written by Twenty31 Consulting (the same firm writing the new ten-year strategy for Travel Alberta), can incorporate a COVID-19 recovery as well as steps to return to the successes of 2015-2019 while adjusting to new realities like reduced cruise traffic, reduced international and long-haul travel and reduced activities involving large crowds or crowded areas.

The new strategy “Charting the Future: A Strategy to Accelerate Prince Edward Island Tourism Growth to 2025” will be created to help grow tourism businesses and new visitor destinations by attracting more private sector investment and alignment with government planning according to Tourism PEI. Last fall, the Tourism PEI Board of Directors identified the need to develop a new plan as the existing strategy concludes in 2021. The strategy planning process will seek input from people in the industry through one-on-one interviews, workshops and an online survey.

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[55] Government of PEI Website – Tourism Indicators – Dec2018 - https://www.princeedwardisland.ca/sites/default/files/publications/2018_tourism_monthly_indicators.pdf

[56] Government of PEI Website – Tourism Indicators – Dec2019 - https://www.princeedwardisland.ca/sites/default/files/publications/201912tourismindicatorsrptfin.pdf

[57] Tourism PEI News Release – Jan2020 - https://www.princeedwardisland.ca/en/news/new-strategy-grow-island-tourism

COVID-19 has many impacts including restricted access and desire to use air travel. With both ferry and road/bridge access to PEI available, it is expected that the provincial and regional tourism marketing organizations will heavily promote to regional visitors later in 2020 and 2021 as travel options reopen. Experiences promoted will likely concentrate on natural experiences, culinary and smaller-group activities. Large events and mass-tourism options (busy marketplaces, malls) will not likely be promoted as much as in the past based on expected visitor preferences in reaction to many months of physical distancing and a better understand of healthy practices in public.

Confederation Bridge and Ferry
Source: Strait Crossing Bridge Limited

A 'new normal' will likely be activated by experience providers in terms of their health and safety protocols and processes. Visitors will want to know how the business will help ensure their experience is healthy and safe. Those businesses that show a specific and meaningful effort to create a healthy environment will gain more positive response from the marketplace. This may require higher costs to operate and increase in fees passed on to the consumer.

PEI has not depended greatly on the international guest as evidenced by the 3% or less of revenues earned from guests outside of North America. PEI may consider targeting a very specific overseas guest looking for natural beauty in expansive, more isolated areas with very healthy and high-quality culinary options.

Partnerships for PEI with regional, provincial and national organizations will be critical to improve coordination, collaboration and reduction in delay in getting tourism back on track on the island.

Indigenous Tourism

In 2016, Statistics Canada reports that there were 2,740 Indigenous people in Prince Edward Island, making up 2.0% of the population which is the lowest percentage of any province in Canada. 64% of the Indigenous population reported living in a rural location and 52% reported living off reserve. The average age of the Indigenous population in Prince Edward Island was 30.4 years, compared with 42.4 years for the non-Indigenous population in the province. The Indigenous population on P.E.I. is growing more quickly than the population of the province as a whole, and more quickly than the Indigenous population nationally. The 2016 census showed a 58% increase in the Indigenous population on P.E.I. from 2006 to 2016 as compared to a 5% increase in the total population. Nationally, the Indigenous population grew 43% from 2006 to 2016.[58]

The Indigenous tourism supply is growing in PEI. According to the Conference Board of Canada, between 2014 and 2018, the number of Indigenous tourism businesses increased by 82% from just 11 businesses in 2014 to 20 businesses in 2018. Of those 20 businesses identified in 2018, the majority of businesses are in travel support services (including retail) and arts & heritage businesses. Atlantic Canada has a total of 191 Indigenous tourism businesses meaning PEI has just over 10% of businesses in the Atlantic region however compared to mainstream overall tourism, PEI represents just 8.3% of the revenues earned in all of the Atlantic provinces.[59]

The Conference Board of Canada's research determined that Indigenous tourism businesses attracted $7.2 million in revenues to the province and provided almost 190 jobs and $2.8 million in labour income

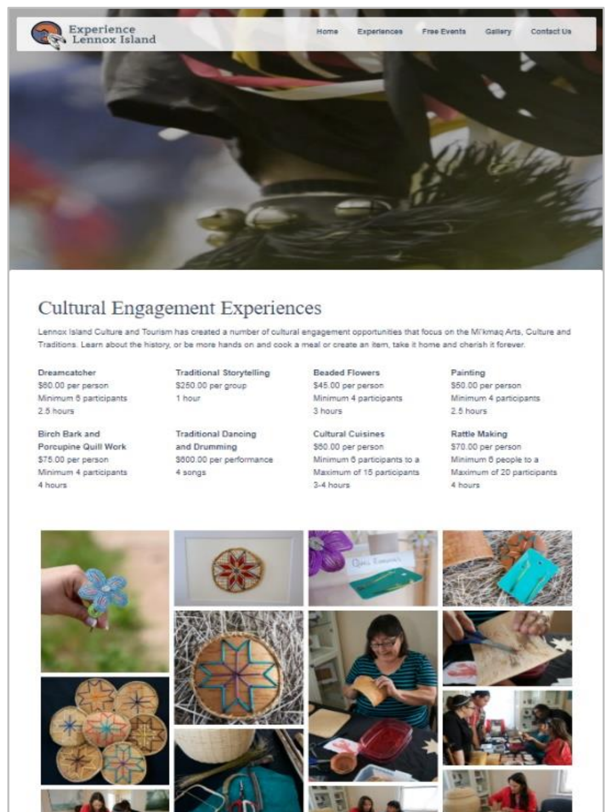
[58] Statistics Canada 2016 Census – PEI Indigenous Population - https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-PR-Eng.cfm?TOPIC=9&LANG=Eng&GK=PR&GC=11
[59] [59] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

leading to $4.2 million in GDP. Of all the Atlantic provinces, PEI has the lowest revenues earned per job in the Indigenous tourism sector. PEI's average is $38,503/job while Newfoundland & Labrador have the highest average at $94,821/job. This indicates the average revenue return per person employed is lower in PEI. PEI, on average, earns $360,000 in revenues per Indigenous tourism business while each of the other Atlantic provinces earn, on average, over $1.3 million per business. This reflects that many businesses in the other provinces are larger scale (including 6 gaming centres in New Brunswick and 19 accommodation providers in Newfoundland & Labrador). PEI receives almost twice the number of tourism visitors each year as compared to Newfoundland & Labrador but falls behind NL in terms of Indigenous tourism revenues and average earnings per business.

> **PEI has the highest number in the Atlantic region of jobs (68), businesses (7) and revenue ($2.63 million) per 1,000 of Indigenous population in the province.**

On a very positive note for the province, when analyzing size of the industry as compared to the size of the Indigenous population, PEI, the smallest province in Atlantic Canada in both size and Indigenous population, has the highest number in the region provinces of jobs (68), businesses (7) and revenue ($2.63 million) per 1,000 of Indigenous population in the province.

The Indigenous Tourism Association of Canada (ITAC) shows, in their online membership listings, just one voting member from PEI: Indian Arts & Crafts. The owner, Doreen Sark, is the provincial representative for PEI on the ITAC Board of Directors. Non-voting members are: Lennox Island Development Corporation, Mi'kmaq Arts Studio and the Tourism Industry Association of PEI.[60]



Sample page from Experience Lennox Island website promoting community tourism. https://experiencelennoxisland.com/2017/06/09/lennox-island-cultural-engagement-experiences/

The Indigenous Tourism Association of PEI was federally incorporated in November 2017 as a not-for-profit corporation with four members making up their Board of Directors. The organization's status is active according to the listings made available by Innovation, Science and Economic Development Canada. The organization has established a Facebook page which indicates "ITPEI is a non-profit and volunteer Indigenous tourism business association mandated by the national body, the Indigenous Tourism Association of Canada, to help assist in the growth of authentic Indigenous tourism experiences in the Province of Prince Edward Island."[61] ITPEI works with the overall tourism industry and Indigenous-owned tourism businesses, First Nation owned community businesses and Indigenous artists and crafters. ITPEI does not currently have an organizational strategic plan or offer specific programs.

Lennox Island First Nation, one of two First Nation bands in the province, has established the Lennox Island Dev Corp (LIDC) who's goals are community self-sufficiency and maximizing their community's economic health. The LIDC welcomes partners from outside of the

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[60] ITAC membership webpage - https://indigenoustourism.ca/corporate/member-directory/

[61] ITPEI Facebook page: https://www.facebook.com/Indigenous-Tourism-Association-of-PEI-103264494659831/

community who wish to partner with LIDC, to create a business joint venture and/or locate a business on Lennox Island. The LIDC promotes their local, community-owned tourism businesses operating in Lennox Island Reserve through their website and active tourism marketing and sales programs.[62] An example of a recently developed tourism experience is Bannock & Clams In the Sand which pairs visitors with community members on the shores of Lennox Island. As the bannock cooks, visitors listen to storytelling while enjoying freshly picked shell fish cooked over the fire. The LIDC also promotes visiting Lennox Island by sharing information about cultural locations and experiences in and around Lennox Island such as the Cultural Centre.[63]

The Mi'kmaq Confederacy of PEI (MCPEI) is owned and governed by the Lennox Island First Nation and the Abegweit First Nation and its Board of Directors is comprised of the Chiefs and Councillors of both First Nations. According to their 2019 annual report, the primary objective of MCPEI is to help elected Mi'kmaq Leadership improve outcomes for the Mi'kmaq People of PEI move toward self-reliance and self-determination.[64] Specific to tourism, the Provincial Indigenous Tourism Roadmap was completed in May 2018 with a goal of "Building capacity to develop and grow Indigenous tourism in Prince Edward Island." The plan was developed by MCPEI in collaboration with the two PEI First Nations and tourism industry stakeholders. The five priorities of the plan are: 1) Leadership and Partnerships 2) Indigenous Tourism Assets (and potential product development), 3) Community Awareness, 4) Market Ready Tourism and 5) Marketing Indigenous Tourism.

Vision of PEI Indigenous Tourism Roadmap

MCPEI's economic development division supports Indigenous tourism growth in the province with funding support received from the Indigenous Tourism Association of Canada, ACOA and Innovation PEI. The Indigenous tourism steering committee (made up of representatives from the PEI First Nations and the Confederacy) implement action items including (in 2019), the development of an Indigenous tourism inventory for PEI; organizing a tourism training circle event for Indigenous artisans and others interested in tourism; hosting a tourism stakeholder meeting to inform and engage government and tourism association partners; and organizing a site visit of PEI Indigenous tourism products for those active in the industry.

The current Tourism PEI strategy references Indigenous tourism through a First Nations – Mi'Kmaq sustainable tourism initiative.[65] The initiative indicates that specific Mi'kmaq experiences can be added to core tourism experiences with unique interpretive elements drawing from traditional knowledge and oral traditions. The non-Indigenous operator can play a key role in connecting adventure tourism guests with Indigenous guides and operators. These Indigenous tourism experiences should showcase Indigenous history and lifestyle. The strategy also demonstrates that support is needed to develop an inclusive Indigenous tourism development plan based on local authentic assets and opportunities that connect to a province-wide product development strategy.

A new overall tourism strategy currently being developed for the province will need to build more specific programs and activities as compared to this very general reference to Indigenous tourism in the 2016 plan. National and regional statistics demonstrate that Indigenous tourism is growing at a greater speed than overall tourism and that there is a growth in demand from high-yield travellers.

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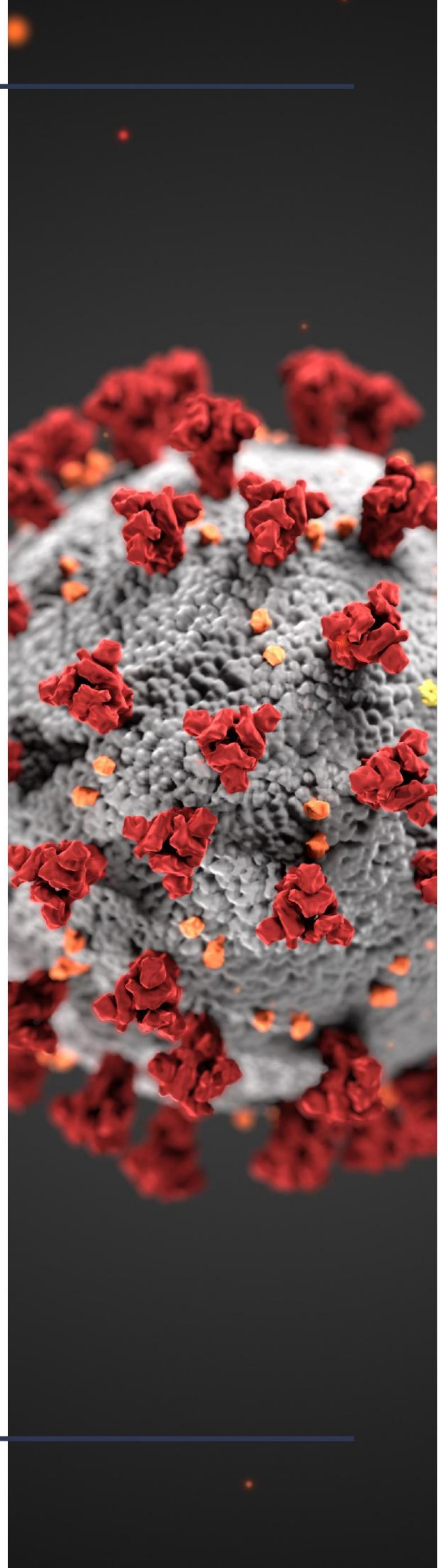
[62] Tourism Lennox Island website: https://experiencelennoxisland.com/
[63] LIDC Tourism webpage: http://lennoxisland.com/attractions/cultural-centre/
[64] MCPEI Annual Report 2019 - http://mcpei.ca/wp-content/uploads/2019/10/MCPEI-Annual-Report-2019-Final.pdf
[65] Tourism PEI Strategy – Tourism Matters – 2016 - http://peitourismmatters.ca/wp-content/uploads/2016/11/PEI-Strategic-Plan-for-Tourism-2021-Final.pdf

It is strongly recommended that PEI Indigenous tourism stakeholders and Indigenous organizations with an interest in Indigenous tourism participate as much as possible in the outreach component of the provincial tourism planning process in 2020 to ensure there is a specific pillar or key strategy that speaks specifically to Indigenous tourism support programs, projects and business growth in PEI.

PEI has very few Indigenous-owned tourism businesses in the accommodations, food and beverage and recreation sectors suggesting that these sectors that typically attract strong levels of revenue from travellers (in particular accommodations and food & beverage) and should be strong considerations for Indigenous product development in the province.

IMPACT OF COVID-19

THIS SECTION OF THE REPORT PROVIDES AN UPDATE ON THE IMPACT OF COVID-19 ON TOURISM NATIONALLY AND PROVINCIALLY - JULY 2020



Impact of COVID-19

It's a challenging time for the tourism sector in Canada due to the wide-reaching impact of COVID-19. Canada's economy has suffered as new health and safety restrictions have been put in place to reduce the spread of the virus in Canada. Across Canada people were asked to stay home, schools were closed, and some businesses were forced to close their doors. The tourism industry in Canada has been one of the hardest hit industries with the dramatic decrease in international visitor due to global travel restrictions. There has also been an impact on domestic tourism in Canada as more travellers are choosing to stay close to home and not travelling outside their own province. COVID-19 will have long lasting impacts on the tourism sector in Canada.

In order to gain a better understanding of the impacts of COVID-19, this report will review both the tourism industry from the more general tourism industry perspective and from the perspective of the Indigenous tourism sector. Key factors to be assessed are gross domestic product (GDP), visitor information, and employment.

National

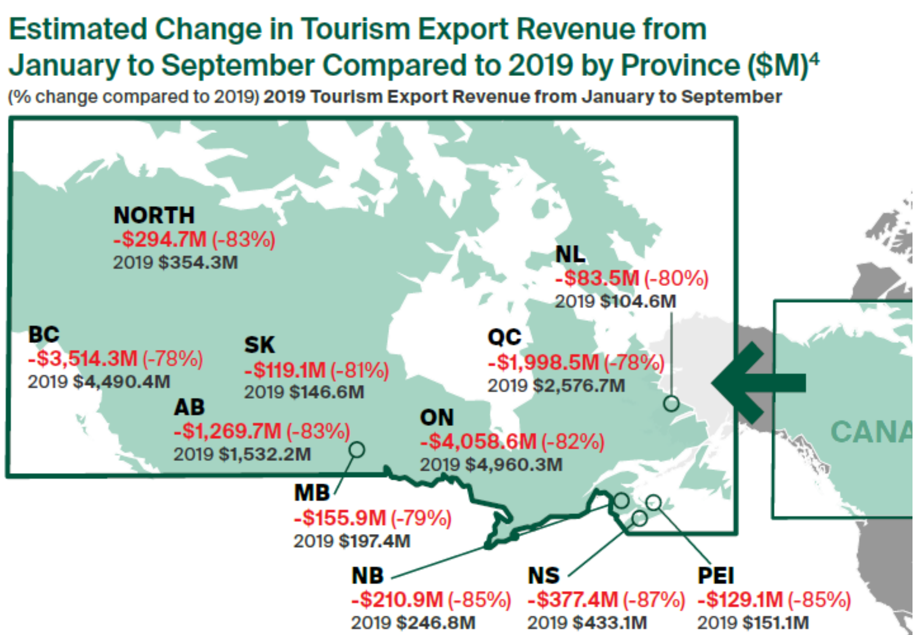
Overview of Industry Impact

Canada's tourism sector has been deeply impacted by the spread of COVID-19 around the global. While Canada has done an amazing job containing the spread of the virus by putting travel restrictions in place as well as various health and safety measure, this has resulted in a dramatic decease in the number of international visitors coming to Canada.

Destination Canada reported that in 2019 Canada experienced its third consecutive record-breaking year for tourism, welcoming 22.1 million travellers to Canada. With its five key markets being the United States, China, the United Kingdom, France, and Mexico, tourism generated an estimated $104.9B in expenditures, contributing $43.5B in GDP and supporting 1 in 10 jobs in Canada.

Economic Impact

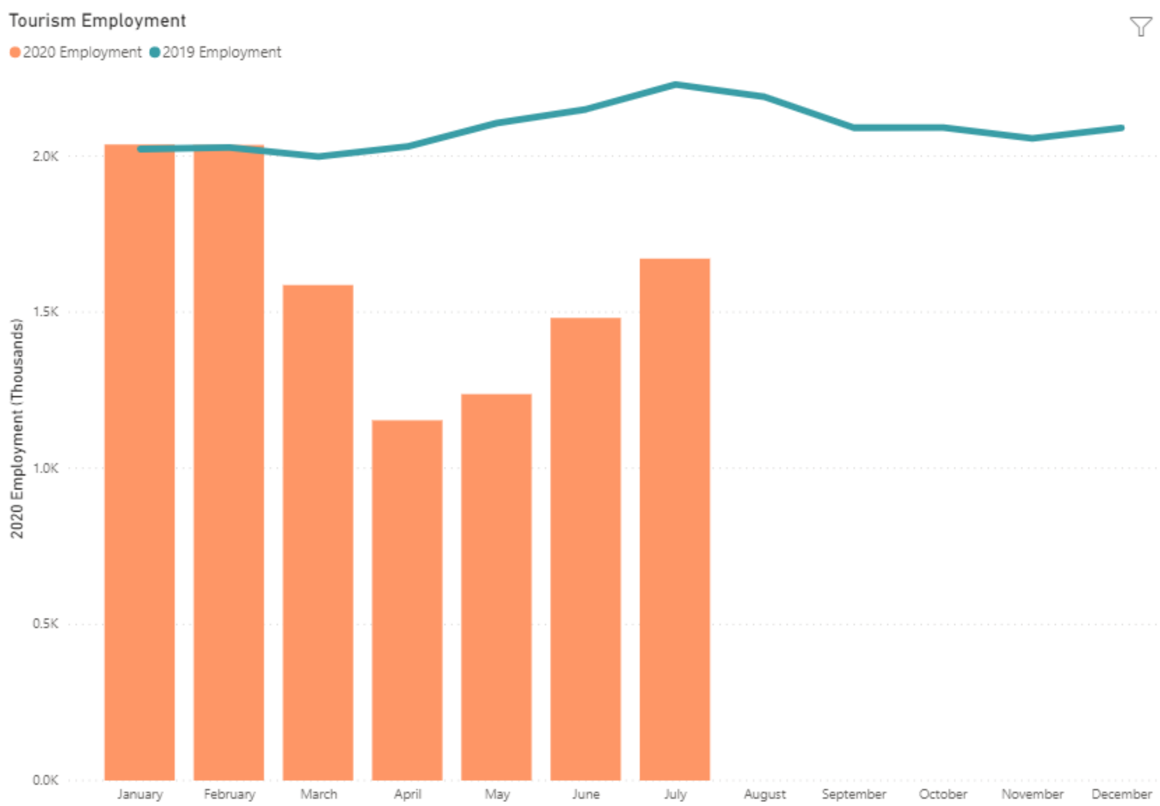
COVID-19 has had a significant impact of the tourism industry in Canada as travel restrictions and boarder closures have been put in place. Destination Canada provided estimates in the change in tourism export revenue compared to 2019 stats by province in their COVID_19 Impact and Recover Report: International Summary (Updated: July 28, 2020).



There has been an estimated $12.2B lost in tourism export revenue lost across Canada from January to September as compared to the same period in 2019.

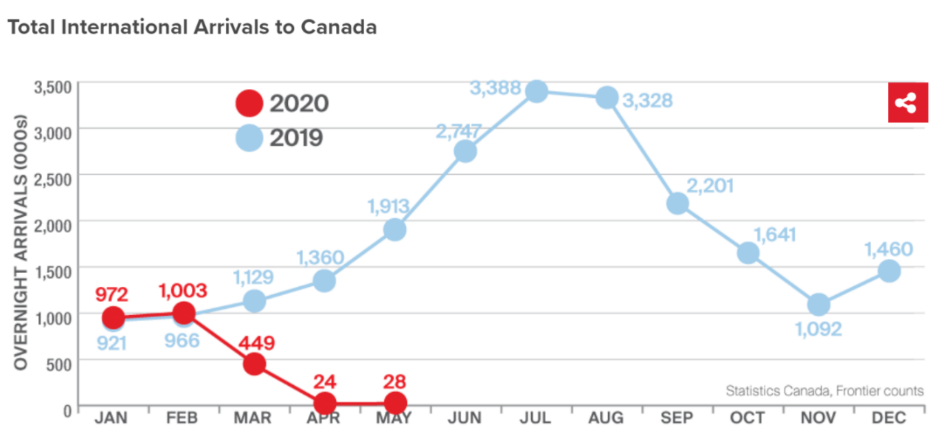
Employment

Tourism employment has also significantly decreased due to the delay in starting the season, significantly reduced consumer demand and/or permanent shut down of businesses. Tourism HR Canada compared 2019 employment statistics to 2020 and estimates that employment in tourism was down by 668,300 jobs in June compared to one year prior. The chart below from Tourism HR Canada represents current data on employment up to July 2020 showing the largest drop in tourism jobs in April.



Visitor Demand

On March 18, 2020 the Government of Canada restricted entry to non-residents for non-essential travel from all international destinations. Destination Canada has produced a comparison of total international arrivals to Canada. From March to May 2020, there were 88.6% fewer international arrivals to Canada (representing approx.. 3.9M fewer total visitors over those three months)



Recovery Moving Forward

The spread of COVID-19 has demonstrated that the tourism industry in Canada is extremely vulnerable to changes that cannot be predicted or control. While it is hard to predict events such as a global pandemic, the travel industry can work together to respond to events that will impact the industry.

Destination Canada has developed a phased approach to tourism industry recovery. The approach is based on the need to understand the resiliency and sustainability of the sector across economic, social, cultural, and environmental factors. Destination Canada's aim is to plan for long-term success that will be defined by how the tourism industry can be re-shaped to be able to collectively respond to the aftermath of the global pandemic.

There is still much uncertainly in the market as travel restrictions has impacted international visitors. But provinces and territories are beginning to reopen in various phased approaches. Provincial marketing organizations are shifting gears to promote staycations and travel within their province and/or territory, while maintaining health and safety measures to reduce the spread of COVID-19. There is an opportunity to attract local travellers to experience the tourism offering within their local region.

Destination Canada's Visitor Demand Forecast (July 2020 Update) provided updated estimates for recovery to 2019 levels. The updated forecast was based on uncertainty around travel conditions that included: border restrictions, travel bubbles/airbridges, and travel insurance. The forecast was also driven by three key areas of uncertainty: health restrictions, economic conditions, and consumer sentiment.

Additional factors that were taken into consideration for the updated estimates were the opening of boarders, when air travel resumes, how key markets are containing the spread of the virus within their own countries. For example, Canada is at the stage where they are able to decrease the number of COVID-19 related restriction while the United States and Mexico are struggling to control of the spread within their boarder.

Below are Destination Canada's updated estimates as of July 2020:

Our April / May COVID Economic Impact Forecasts were based on assumptions on traveller behaviour, border & travel restrictions and economic impacts

We are revising our core assumptions and scenarios

	Scenario	Assumptions	Recover to 2019 levels by…	Tourism Impact
April / May	Virus Contained	Travel resumes in June	2022	-35%
April / May	Virus Not Contained	Uneven travel resumption	2024	-59%
July	1. September Restart	Borders re-open at end of August/start of September	2023	-54%
July	2. Borders closed to 2021 (upper bound)	Borders closed to 2021	2023	-43%
July	3. Borders closed to 2021 (lower bound)	Borders closed to 2021	2024	-61%

Based on Destination Canada's research, tourism revenues are expected to fall approximately 43%-61% in 2020 in comparison to 2019. When reviewing estimates its important to also take into consideration that high level of uncertainty for many factors impacting tourism moving forward. Additional information and future revised estimates will be provided by Destination Canada as the situation develops.

Indigenous Tourism

Overview of Industry Impact

The effects of COVID-19 on Indigenous tourism businesses in Canada have been very significant as many communities had restricted visitors from coming to their community. By restricting visitors, Indigenous communities are able to better prevent the spread and keep community members safe. Ensuring that those most at risk such as elders and knowledge keepers will not be exposed ensures cultural preservation. For many Indigenous tourism operators, the 2020 season had not started when Canada first became to experience cases of COVID-19. The resulting travel restrictions limiting international, national, and even local visitors were already in place when many tourism businesses would have been opening for the season.

The Indigenous Tourism Association of Canada (ITAC) commissioned the Conference Board of Canada (CBOC) to provide an economic assessment of COVID-19's impact on Indigenous tourism in Canada. As part of the assessment the CBOC looked at the economic impact of the significant decrease in tourism and how it related to gross domestic product (GDP), employment, and business growth.

The below table from the CBOC's economic assessment provides estimates of how the sector performed in 2019 and the revised COVID-19 estimates for 2020, as well as revised targets for 2024.

Summary of key measures and ITAC's goals for the Indigenous tourism sector in Canada

Measures	Revised 2017 estimates	2019 estimates	2020 estimates	2024 goals
Direct Employment (Peak Employment)	35.0k	36.0k	14.6k	49k
Direct GDP	$1.5B	$1.6B	$555M	$1.9B

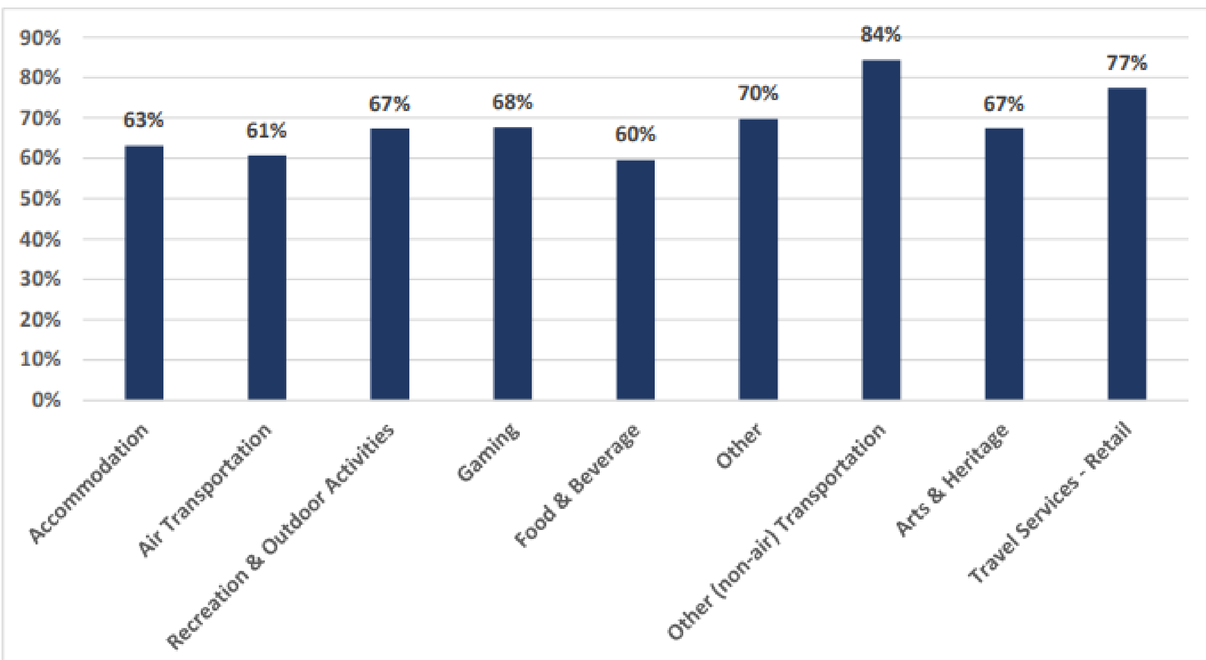
Source: The Conference Board of Canada

For many Indigenous tourism operators there is a concern that if the spread of COVID-19 does not decrease and travel restrictions are still in place, there is a real risk of permanent closure if the situation continues into 2021. According to ITAC there is an estimated 714 Indigenous tourism businesses, representing over one third of all Indigenous tourism businesses, which are at serious risk of closure in 2020-2021.

Economic Impact
In early 2020 ITAC conducted a survey of Indigenous tourism operators to gather information about the current and expected impacts of the global pandemic. Respondents were asked what the expected impact on revenue would be in 2020 and how long they expected these conditions would impact their businesses ability to generate revenue into the future.

Respondents indicated that they expected to lose an average of 60% of their expected revenue in 2020 across all industry domains. Indigenous tourism businesses in the transportation (non-air), and travel services-retail are expecting to be the hardest hit.

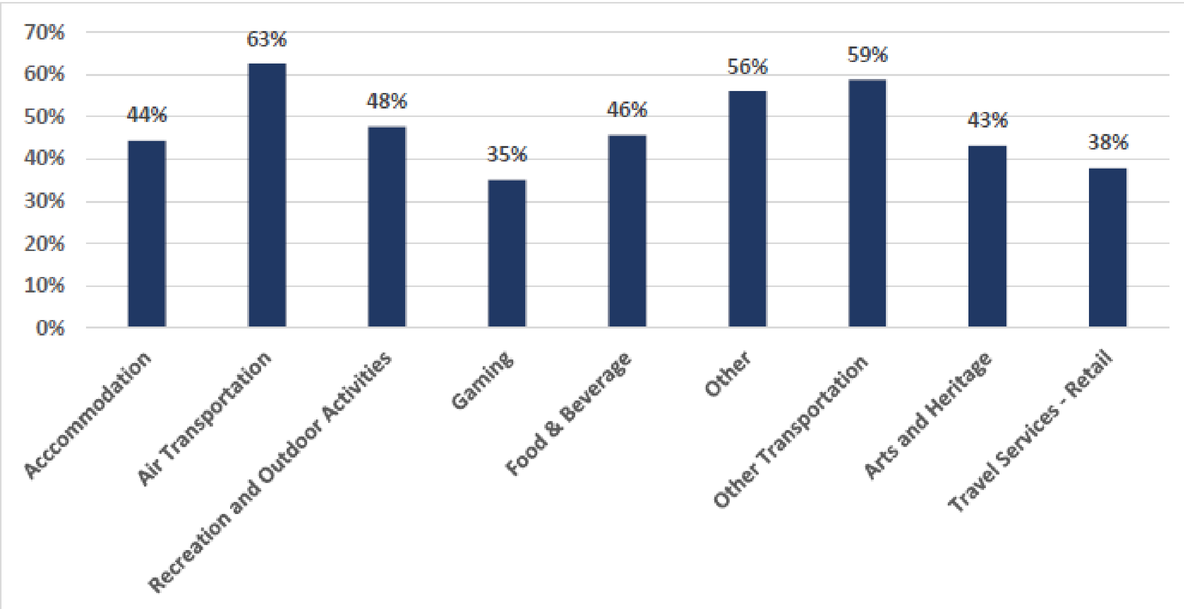
Expected revenue losses in 2020
(Decrease in annual revenues from 2019, Per cent)



Source: The Conference Board of Canada

As a direct result of the loss in expected business revenue, many businesses are experiencing conditions that could lead to permanent closure for their business. Across all industry domains, Indigenous operators felt that there was a 40% change that their business would close permanently in 2020 or 2021. As indicated in the chart below, the industry domains most concerned about the possibility of permanent closure was in air transportation, and other forms of transportation.

Probability of having to close operations permanently due to COVID-19
(Percentage chance)

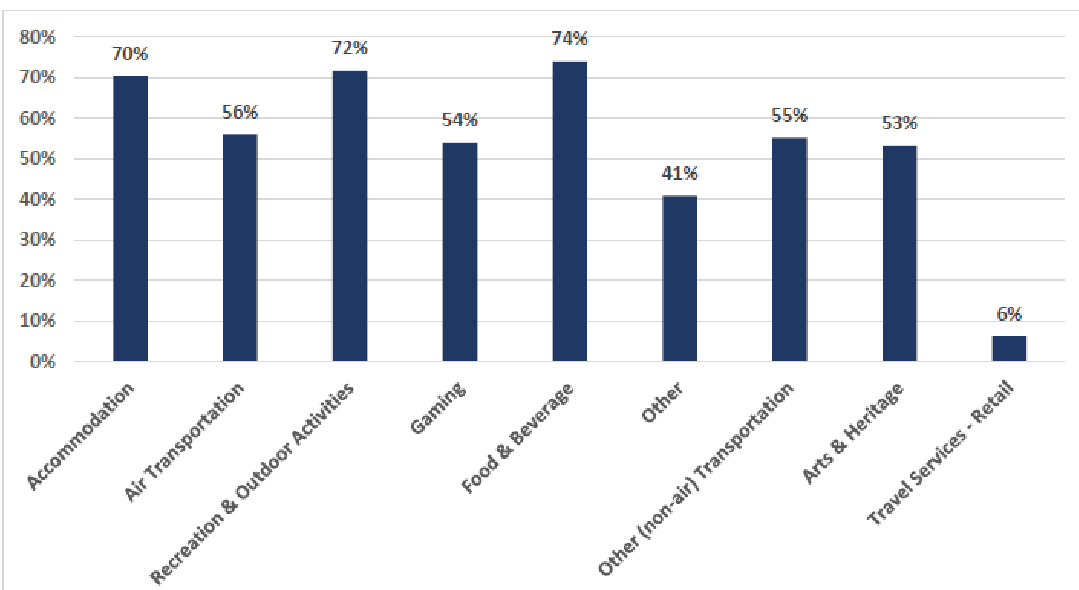


Source: The Conference Board of Canada

Employment Impact

Respondents to the survey indicated that they expected employment losses over 50% due to COVID-19. The percentage represents the decrease in annual employment from 2019. The highest levels of employment losses were expected in the sectors of food & beverage, recreation & outdoor activities, and accommodations.

Expected employment loss in 2020
(Decrease in annual employment from 2019, Per cent)

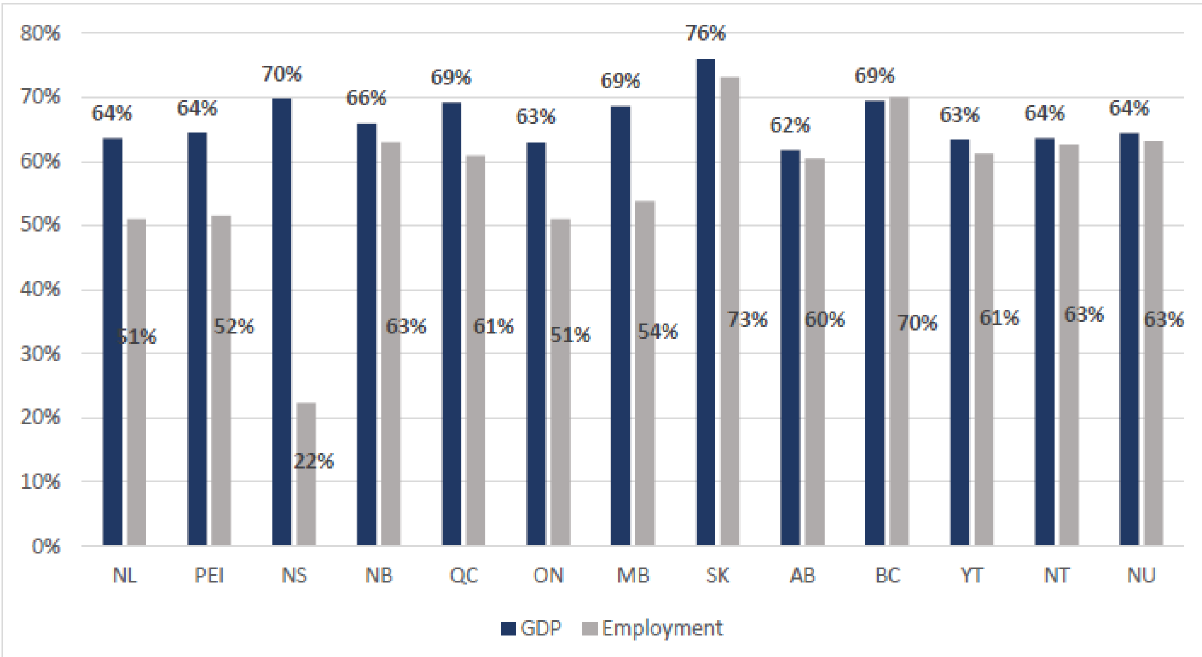


Source: The Conference Board of Canada

This last graph below represents the Indigenous tourism decline in GDP and employment by province and territory as reported by ITAC. Across all provinces there is a significant percentage decrease in GDP, which ultimately affects the ability for businesses to employ staff and maintain operations.

Provincial/territorial level impacts of COVID-19 in 2020

(Decline in GDP and Employment across provinces from 2019, Per cent)



Source: The Conference Board of Canada

Recovery Moving Forward

In response to COVID-19 the Indigenous Tourism Association of Canada has developed a strategic recovery plan for the Indigenous tourism association that includes three strategic priorities for recovery:

I. Ensuring the sustainability of ITAC member businesses across the country.
   - This will be achieved through the creation of a stimulus investment fund for Indigenous tourism operators and an increased emphasis on education and training
II. Ensuring the sustainability of the provincial and territorial Indigenous tourism associations.
   - This will be achieved by supporting the ability of provincial and territorial Indigenous tourism associations to maintain their membership and infrastructure
III. Ensuring the sustainability of ITAC's national operations.
   - This will be achieved with an emphasis on leadership and through a strengthening of relationships with our industry and government partners.

ITAC has revised their 2024 economic targets in light of the global pandemic and the affect it has had on Indigenous tourism businesses. The 2024 revised target is to return to the industry's pre-COVID levels:

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

ITAC's strategic recovery plan aims to align with the recommendations of the United Nations World Tourism Organizations and Destination Canada's COVID-19 plan. The three phase approach for ITAC includes:

I. Phase 1 – Response (April 2020 – June 2020)
   - Objective: To ensure the survival of as many Indigenous tourism businesses as possible, while supporting the provincial and territorial Indigenous tourism associations and preparing for future recovery.

II. Phase 2 – Recovery (July 2020 – March 2021)
   - Objective: To safely restart the Indigenous tourism industry with a focus on domestic travel while continuing to build capacity amongst our membership and providing stimulus support where required.

III. Phase 3 – Resilience (April 2021 – March 2024)
   - To reach our 2024 targets while ensuring the long-term sustainability of our industry and strengthening its ability to handle future pandemics or other disasters.

Atlantic Canada Region

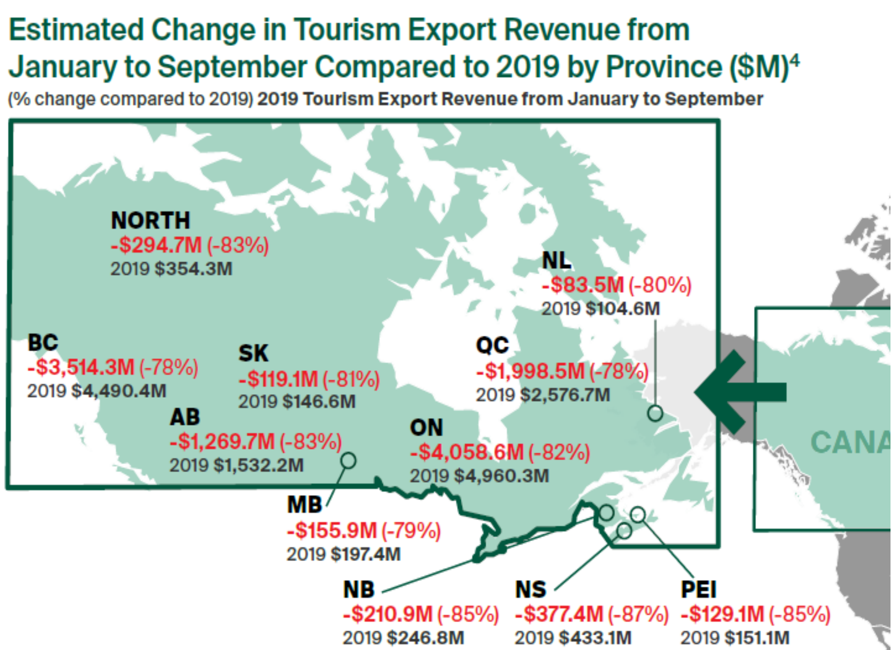
Overview of Industry Impact

Atlantic Canada's tourism industry has been extremely impacted by COVID-19, the industry accounts for 4% of all jobs in the Atlantic region and 2% of GDP according to the Atlantic Provinces Economic Council's recent report on COVID-19. The tourism industry in Atlantic Canada has shown many years of steady progressive growth within the region, but due to COVID-19 there will be significant recovery time that will impact the industry's GDP, employment, and number of visitors to the region. In the past the Atlantic region as a destination was considered to be extremely safe. Like many other destinations in Canada and around the world, travel will be significantly impacted by visitor confidence. Confidence will return to the tourism industry once COVID-19 is considered under control and the spread has stopped.

Economic Impact

COVID-19 has had a significant impact of the tourism industry in Atlantic Canada as travel restrictions and border closures have been put in place. Destination Canada provided estimates in the change in tourism export revenue compared to 2019 stats by province in their COVID-19 Impact and Recover Report: International Summary (Updated: July 28, 2020).

There has been an estimated $800.9M in



tourism export revenues lost in the Atlantic Canadian provinces from January to September as compared to the same period in 2019.

Recovery Moving Forward

According to a recent report from the Atlantic Provinces Economic Council on COVID-19's key issues for Atlantic Canada, the Atlantic region is recovering faster than nationally due to its success in largely eliminating the virus within the four provinces.

In response to the global pandemic, the Atlantic Canada provinces have created what they have called the "Atlantic Bubble", which means that the residents of the four Atlantic Provinces (New Brunswick, Newfoundland and Labrador, Nova Scotia, and Prince Edward Island) are able to travel with the Atlantic Canada without being required to self-isolate. The Atlantic Bubble started on July 3, 2020. Visitors from the outside the region, but still from Canada, are required to follow the local entry requirements in place in each province, which may include 14-day isolation.

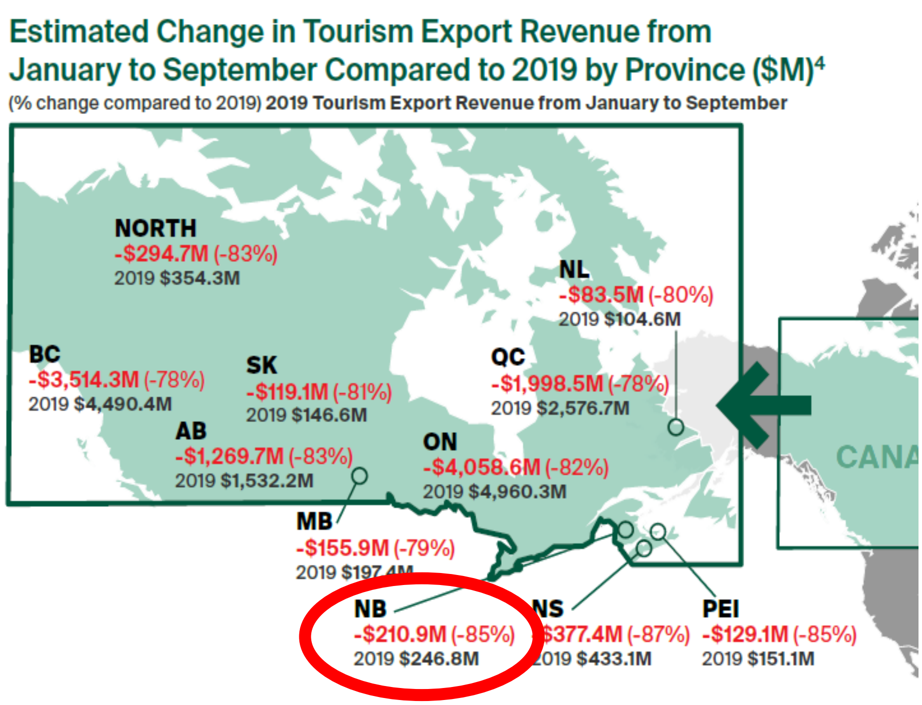
The Atlantic Bubbles encourages travel within the provinces and gives regional tourism businesses the opportunity to compete for local tourism dollars. In the past the Atlantic region mainly targeted international visitors and visitors from other provinces. In the next sections we will take a closer look at each provinces recovery plan.

New Brunswick

Economic Impact

In response to the impact of COVID-19 the Tourism Industry Association of New Brunswick (TIANB) conducted a survey to gather information on how the crisis was impacting tourism businesses in the province. The survey looked at number of key areas including actions businesses were currently taking in response to COVID-19, and the percentage of employees being laid off.

The results of the TIANB's survey 4 showed that 70% of tourism businesses were closing temporarily, and that 57.2% of business were considering temporary closure within the next three months. Further highlighting the serious economic impact to businesses, 22.2% of responding businesses feel they are at risk of closing permanently within the next three months.

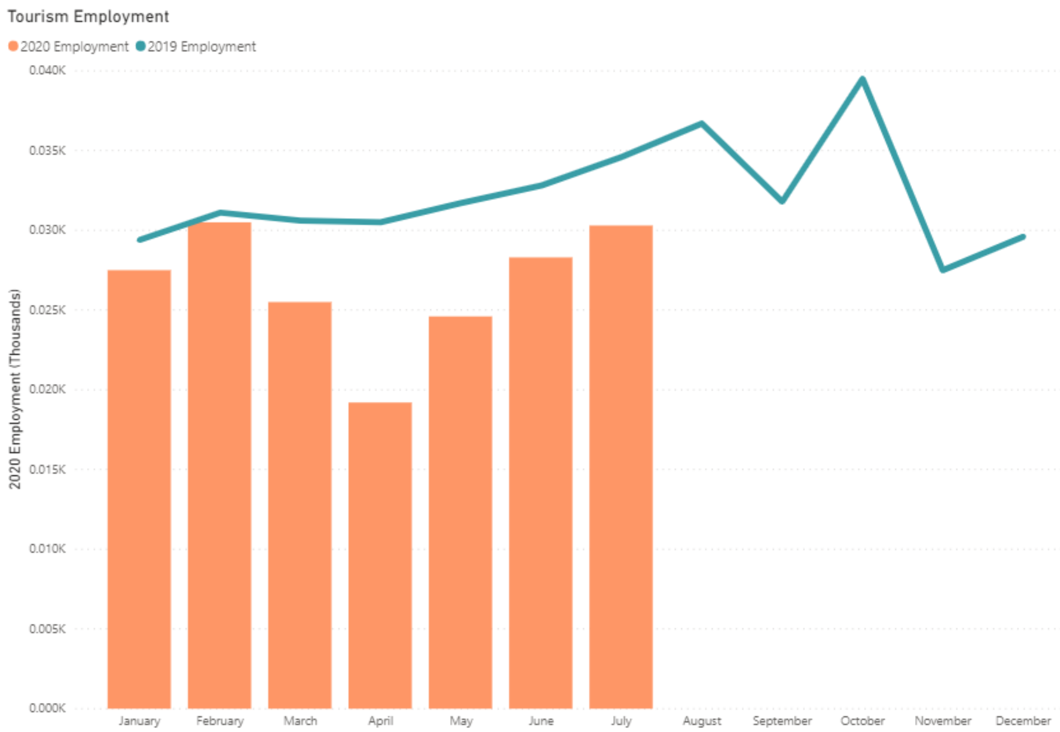


Looking at the map graphic of Destination Canada's COVID-19 Impact and Recovery Report, New Brunswick has seen an estimated $210.9M lose in tourism export revenue over a 9-month period. This is a -85% change compared to 2019.

Employment

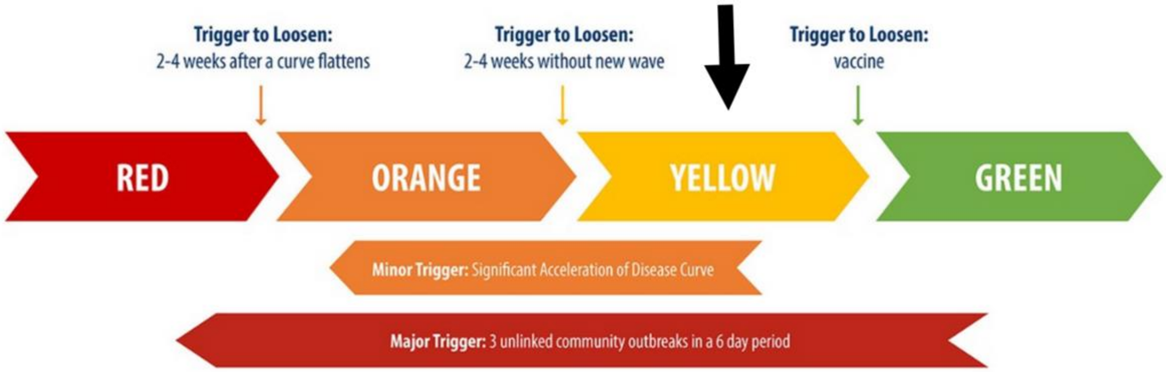
As a direct result of the loss of tourism export revenue, employment within the industry has decreased. From April 27th to May 19th TIANB surveyed operators to collect information regarding how employment was impacted; 38% of respondents indicated that they had laid off staff and 24% had deduced their staff hours. Operators were also asked to indicate the risks to their business looking ahead at the next 3 months, 54% indicated that they would have to lay off employees, and that 49% would be unable to pay staff wages.

The chart below from Tourism HR Canada reflects a similar sentiment of operators surveyed by TIANB. The chart represents current data on employment up to July 2020 showing the largest drop in tourism jobs in April. There is an increase in employment leading up to July, but employment is still a significantly lower compared to 2019 employment.



Recovery Moving Forward

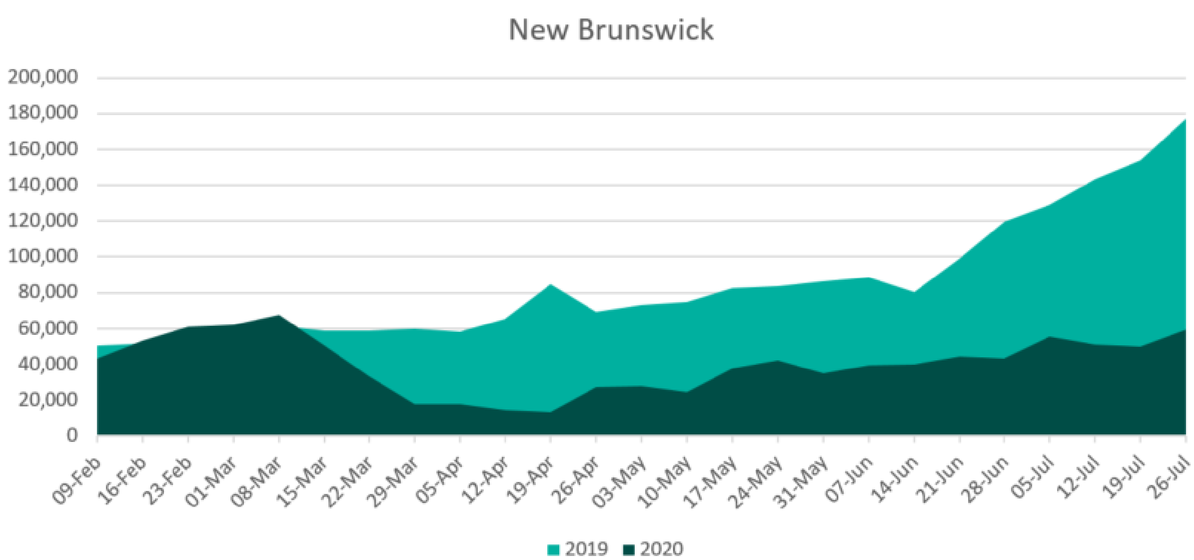
New Brunswick is currently in the Yellow Phase (phase 3 of 4 towards full reopening of the province), in this phase some facilities have started to reopen and travel within the province and Atlantic Bubble are permitted.



New Brunswick is currently is in the Intra-Provincial phase and at this stage travel is permitted without self-isolation within the Atlantic Bubble, unless you have symptoms or have been in contact with someone that may have been sick. Quebec tourists are allowed to drive through NB and PEI to reach the Magdalene Islands, but are not allowed to stay overnight, and must register online with NB and PEI. Visitor information centres remain closed as of mid-August 2020 and no reopening date has been establish.

Tourism New Brunswick reported that Intra-Provincial travel searched are above 2019 levels as more residence are travelling within the Atlantic Bubble. Online surveys conducted by Tourism New Brunswick between June 27th and July 8th indicated that 66% of New Brunswick residents said their overnight travel plans were affected by COVID-19, but 81% indicated that they are likely to Travel within New Brunswick in summer and fall of 2020.

Visitation in New Brunswick has increased for the week of July 26, with almost 10,000 additional overnight stays in New Brunswick. The below graph compares weekly movement within the province in 2020 compared to 2019.



TIANB's July survey of tourism businesses provided an update on the state of the industry, 15% of respondents saw an increase in booking with the opening of the Atlantic Bubble, 85% of the respondents indicated that they did not see a difference.

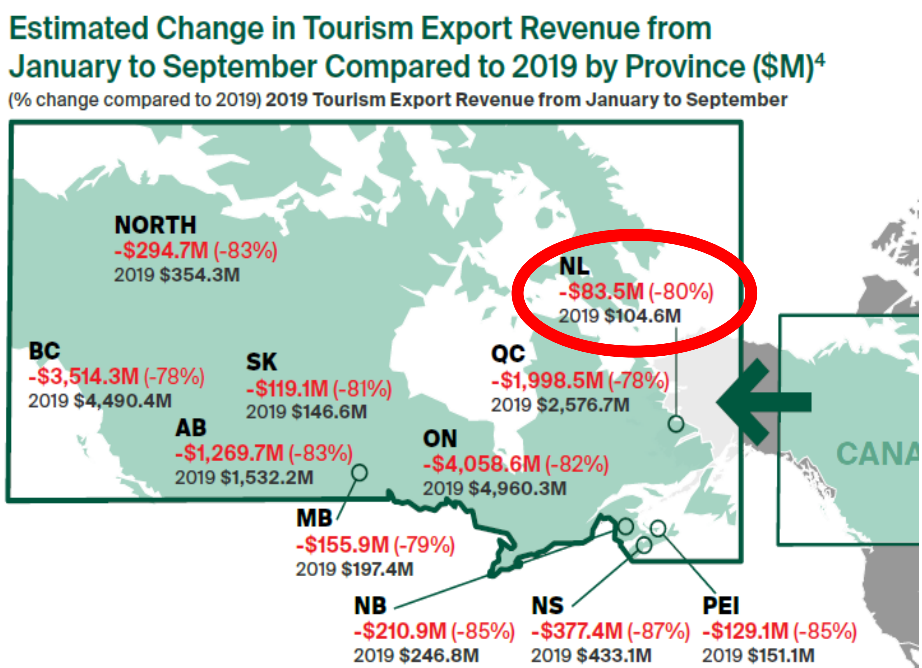
Tourism New Brunswick have shifted marketing focus to staycations, with most businesses following this marketing strategy to promote local travel, as well as focusing marketing efforts on communicating COVID-19 safety protocols to prospective visitors.

Newfoundland & Labrador

Economic Impact

The remote province of Newfoundland and Labrador has been particularly hard hit with the travel restrictions put in place as a result of the COVID-19 pandemic. As an example, according to GanderAirport.com, in April and May, passenger traffic was down 98% over 2019 levels. Peter Avery, CEO of St. John's International Airport, indicated to CBC.ca that passenger numbers at St. John's were down more than 95 per cent in April 2020 as compared to April 2019. Just 5,424 passengers flowed through the St. John’s airport in April, compared with 117,228 for the same period last year.
In the restaurants and bars sector, Statistics Canada indicates that in Newfoundland & Labrador in April 2020 there was a 58% reduction in spending at these establishments as compared to April 2019.

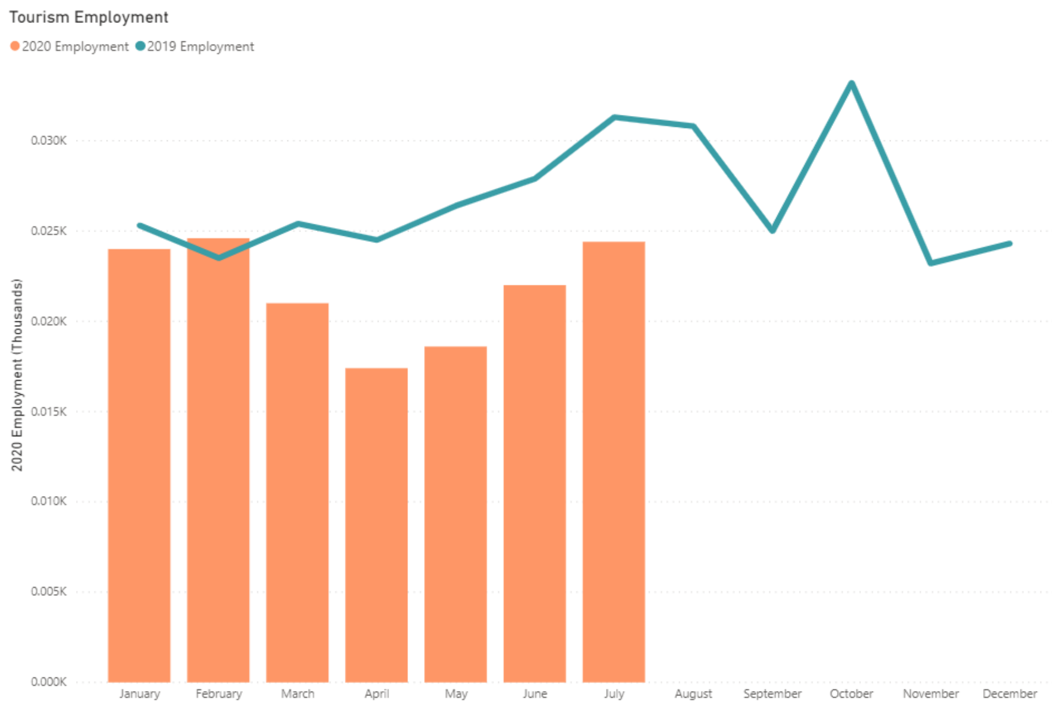
Looking at the map graphic of Destination Canada’s COVID-19 Impact and Recovery Report, Newfoundland & Labrador has seen an estimated $83.5M loss in tourism export revenue over a 9-month period. This is a 80% reduction in revenues compared to 2019.



Destination Canada’s review of the domestic market shows that in Newfoundland & Labrador intra-provincial (within the province) travel searches are above the same period in 2019 and Newfoundland & Labrador continues to have a low number of weekly COVID cases.
Combined with intra-provincial accommodation bookings that have recently been at moderate levels, these signals indicate that Newfoundland & Labrador is in the Intra-Provincial phase (as are each of the Atlantic provinces).

Employment

With a 60%+ reduction in spending in tourism-related industries and fewer travellers, the number of tourism jobs are reduced with reduced levels of services offered and fewer consumers.
The Tourism HR Canada chart below represents current data on employment up to July 2020 showing a 30% drop in employment in April 2020 as compared to April 2019. July would typically see over 30,000 tourism jobs however in 2020 the employment for July was well under 25,000.



Recovery Moving Forward.

In May, the province of Newfoundland & Labrador announced $25 million in provincial money to support the tourism industry, with small and medium-sized businesses eligible for a $5,000 or $10,000 non-repayable contribution, depending on their size. The money is only accessible to businesses regulated by the province, meaning AirBnBs are not eligible for support. Premier Dwight Ball indicated to theglobeandmail.ca that the NL government recognizes tourism's role as an economic driver in the province and that it has been one of the hardest-hit industries during the COVID-19 pandemic. The Tourism and Hospitality Support Program is designed as a short-term program aimed at helping operators cover business costs as they face losses from the steep drop in out-of-province visitors this year. Premier Ball feels that by supporting tourism we are fostering economic development, which is critical to diversifying, growing and strengthening the NL economy.

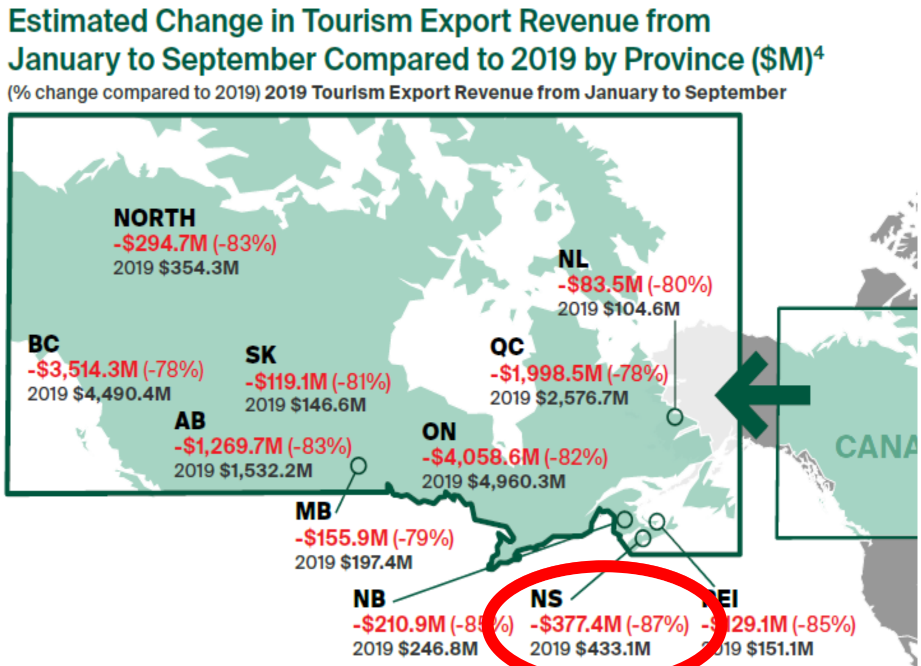
Steve Denty, the Chair of Hospitality Newfoundland & Labrador, indicated to CBC.ca that their organization's short-term plan includes promoting tourism inside the province before anything else.

Nova Scotia

Economic Impact

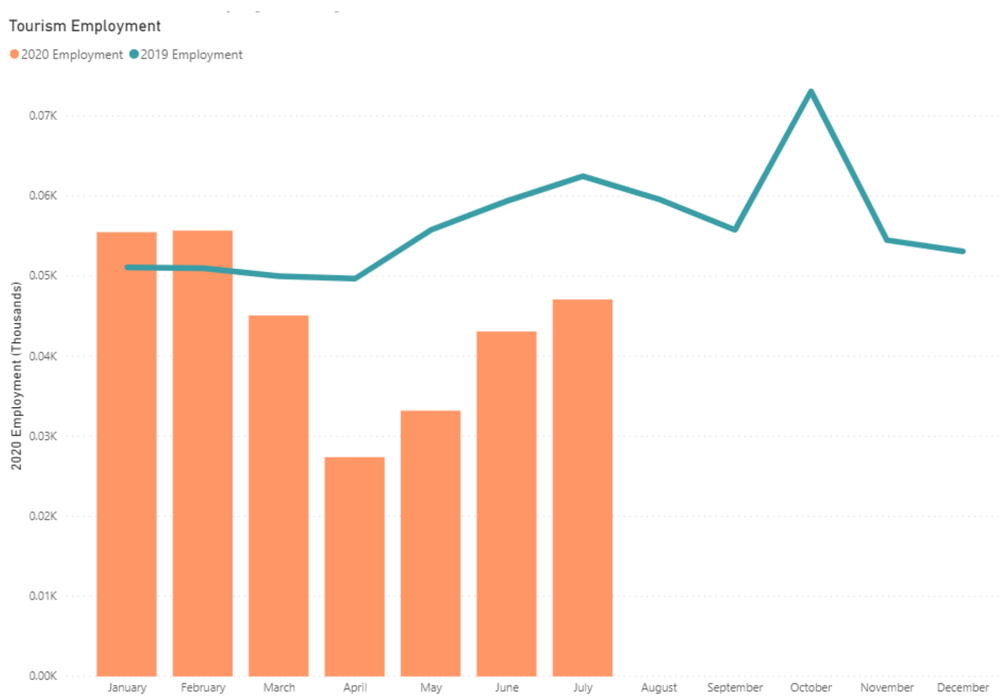
Nova Scotia saw the largest negative change in tourism export revenue among the Atlantic Provinces. Looking at how accommodations were impacted, operators in the province reported a 31% decrease in room nights from January to April 2020, according to Tourism Nova Scotia. The decrease was the most significant in April when accommodation operators saw a 75% decrease in room nights due to COVID-19. In 2019 25% of visitors from Nova Scotia were from P.E.I., Newfoundland and New Brunswick, 50% of visitors were from outside of the Atlantic Canada region.

Looking at the map graphic of Destination Canada's COVID-19 Impact and Recovery Report, Nova Scotia has seen an estimated $377.4M loss in tourism export revenue over an 9 month period. This is a -87% change compared to 2019.



Employment

As a direct result of the travel restrictions and significant decrease in tourism export revenue in the province, employment has seen a significant decrease. The chart below represents current data on tourism employment up to July 2020 showing the largest drop in tourism jobs in April with almost a 50% drop.



There is an increase in employment from April in each month to July, but employment is still significantly lower compared to 2019 employment levels with almost a 25% loss in jobs in July.

Recovery Moving Forward

Nova Scotia does not have a phased approach to reopening but is currently in the process of gradual reopening within the province beginning June 15th. As part of the Atlantic Bubble, Nova Scotia residents are able to travel within the Atlantic region without being required to self-isolate beginning July 3rd. Provincial border crossing does require a proof of residency for Atlantic Canadians and self-declaration form for other travellers.

Tourism Nova Scotia has focused on six strategic marketing approaches to promote travel within the province:

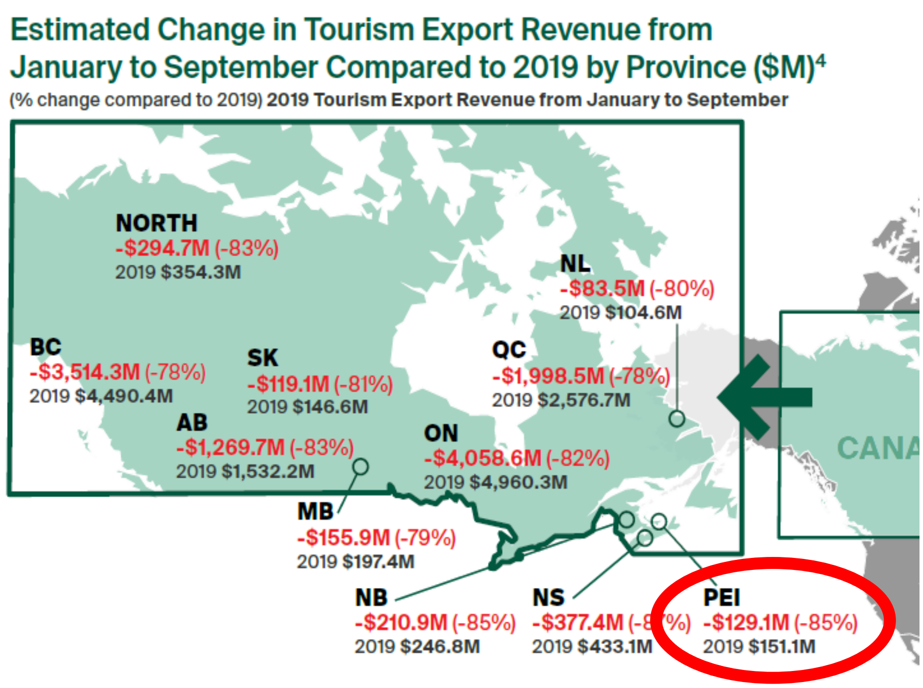
- "Stay Home" - to encourage travellers to stay home and stay safe until conditions improve.
- "Nova Scotia – Still Together" Video #WaitToVisitNovaScotia - to share Nova Scotia's spirit of community and support for one another while staying home and staying safe and to keep Nova Scotia top of mind in a relevant and appropriate manner.
- Nova Scotia Marketing Campaign (late June/early July) - to give Nova Scotians compelling reasons to start travelling within the province again.
- Regional Marketing Campaign (Timing TBD) - to give Atlantic Canadians compelling reasons to start travelling to Nova Scotia again.
- TNS Target Markets (Timing TBD) - to let our target markets know they are open for business and looking forward to seeing them.
- Nova Scotia Confidence Campaign (Timing TBD) - to continue to foster support, pride and confidence in the provincial tourism industry.

Prince Edward Island

Economic Impact

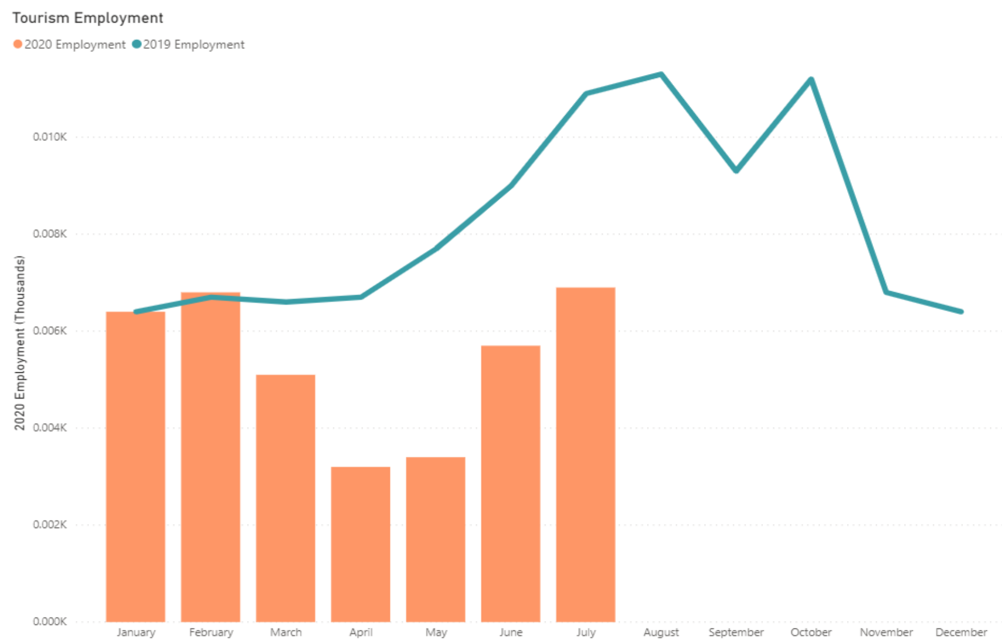
Prince Edward Island's tourism economic is expected to lose 85% of its tourism businesses because of the global pandemic which has stopped visitors to the island for several months. In 2019 PEI's Department of Economic Growth, Tourism and Culture estimated that approximately 1.6 million people visited the island. Looking at Destination Canada's COVID-19 Impact and Recovery Report, PEI has seen an estimated $129.1M loss in tourism export revenue over a 9-month period. This is a 85% drop compared to 2019.

In the early stages of the global pandemic transportation to the island was reduced to allowing only residents of the island into the province. This significantly impacted tourism in the province but has had a direct impact in reducing the spread of the virus in the province.



Employment

The chart below represents current Tourism HR Canada's data on tourism employment up to July 2020 showing the largest drop in tourism jobs in April. There is an increase in employment each month after April with a steep increase in June but employment is still significantly lower compared to 2019 employment. In April CBC News reported that the PEI Government was preparing for 20,000 in job losses, of this an estimated 5,300 would be related to accommodations and food services, 3,400 to retail trade, and 1,600 to arts, entertainment, and recreation.



Recovery Moving Forward

PEI COVID-19 Recovery Plan consists of four phases, with PEI currently in Phase 4. Currently PEI is in the Atlantic Bubble, this program allows visitors to the island, but they must complete a self-declaration form if they are not permanent residents of Atlantic Canada. If visitors are from outside the Atlantic provinces, they must provide proof they have been in the Atlantic Provinces for at least 14 days. Additional services have also begun to open in late June including campgrounds, inns, and B&Bs. The Charlottetown airport has also resumed operations but offers limited flights.

BEST PRACTISES

INDUSTRY BEST PRACTICES OF INDIGENOUS TOURISM – A PROVINCIAL PERSPECTIVE

Best Practices

Industry Best Practices for Indigenous Tourism – A Provincial Perspective

Indigenous tourism has been growing steadily in Canada, at a pace that is higher than the overall tourism sector in Canada. The Conference Board of Canada's 2018 study examining the economic impact of Indigenous tourism in Canada discovered that the Indigenous tourism sector is growing at a rapid rate, outpacing Canadian tourism activity overall. The direct economic benefits measured in Gross Domestic Product (GDP) gained from the Indigenous tourism sector in Canada rose 23.2% between 2014 and 2017, going from $1.4 billion to $1.7 billion compared with a 12.0% increase in overall tourism activity in Canada.

This pace of growth and the level of economic activity derived from Indigenous tourism, however, is not consistent across Canada.

This section of the study examines Canadian provinces where the Indigenous tourism sector is becoming established and reports on the tourism economy of those provinces and the efforts that have been successful to effectively replicate this success in the Atlantic provinces.

> **Indigenous tourism has been growing steadily in Canada, at a pace that is higher than the overall tourism sector in Canada. … This pace of growth and the level of economic activity derived from Indigenous tourism, however, is not consistent across Canada.**

1. Identifying Provinces with Established Indigenous Tourism

To assist with identifying best practices for the Atlantic provinces to use for guidance in moving forward with their efforts to grow Indigenous tourism, this analysis identifies provinces with established Indigenous tourism industries using two primary variables: 1) Number of Indigenous tourism market-ready businesses which shows the level of establish product available and size of industry and 2) Existence of an active Indigenous tourism association with a primary objective to support and grow Indigenous-owned tourism-related businesses.

1) Number of market-ready businesses: A market-ready business is an established business that markets to potential visitors, has a published pricing, payment and cancellation policy, responds to information or booking requests in 48 hours or less and is set up to accept advanced reservations. For the purpose of this report, we are measuring market-ready based on number of Indigenous Tourism Association of Canada (ITAC) voting members from each province. A voting member with ITAC requires that the business be: a) Indigenous-owned or controlled and b) market-ready. The three provinces in the country with at least 25 market-ready tourism businesses (based on voting membership with the Indigenous Tourism Association of Canada) are Québec (97 businesses), Ontario (78) and British Columbia (36). These three are also the only provinces with more than 200 total Indigenous tourism businesses identified in the ITAC 2018 national research.[66]
2) Existence of an active Indigenous tourism association: An active tourism association typically provides support programs, marketing, research, advocacy and training opportunities. These support programs are important to businesses to help them establish their business and grow their results. Over half of the provinces and territories in Canada have a formally incorporated Indigenous tourism association however they range significantly in terms of their level of support

[66] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018 - https://indigenoustourism.ca/corporate/conference-board-of-canada-research/

activity and length of time actively offering support through advocacy, promotions and development programs. There are three provinces that have Indigenous tourism associations consistently active with support programs for 20 or more years: Québec (established in 1991), British Columbia (launched in 1996) and Yukon (launched in 1994).

When combining the two variables above we have British Columbia and Québec who are listed in both categories and will be used in this study as the primary focus of study for best practices. The other two provinces that appear in one of the variables above, Ontario and Yukon, will also be used for additional analysis to determine additional best practices relating to their success in establishing Indigenous tourism in the province or territory.

The following table has been created to demonstrate key tourism economic indicators of the four provinces with an established Indigenous tourism industry to be reviewed in this section of the report as compared to the four Atlantic Provinces.

Indigenous Tourism Levels as compared to Population, Growth and Overall Tourism Performance

	Indigenous Tourism Jobs	Jobs/1,000 Indigenous Pop.	Indigenous Tourism Businesses	Percentage Growth Businesses since 2014	Indigenous Tourism Revenues	Percentage of All Tourism Revenues
NB	829	28.2	51	7.8%	$ 71,300,000	4.5%
NL	1,004	22.0	72	41.7%	$ 95,200,000	8.4%
NS	876	17.0	31	-22.6%	$ 51,400,000	2.0%
PEI	187	68.2	37	70.3%	$ 7,200,000	1.5%
Atlantic	**2,896**	**22.4**	**191**	**27.7%**	**$ 225,100,000**	**3.9%**
BC	6,957	25.7	341	11.7%	$ 524,200,000	2.6%
Ontario	12,924	34.5	558	15.9%	$ 1,368,300,000	4.0%
Quebec	4,083	22.3	217	9.2%	$ 297,600,000	3.4%
Yukon	974	118.9	82	30.5%	$ 83,500,000	10.0%
Canada	**39,036**	**23.3**	**1875**	**16.5%**	**$ 3,793,500,000**	**3.7%**

Data Sources
Indigenous tourism data: Canada's Indigenous Tourism Sector - Conference Board of Canada
Overall tourism data: Tourism Industry Association of Canada

The table above shows the significant levels of Indigenous tourism activity and performance in the provinces to be profiled in this report as well as comparing it to the provincial population for each province, growth in Indigenous tourism from 2014 to 2018 and percentage of overall tourism in the province. Ontario leads the way in terms of total businesses, jobs and revenue related to Indigenous tourism in the province. Interestingly, Yukon has a similar amount of businesses, jobs and revenue as Newfoundland & Labrador however leads the way in terms of jobs per 1,000 Indigenous population in Yukon and percentage of overall tourism in the territory. The percentage growth in the number of businesses from 2014 to 2017 is approximately 15% or lower in BC, Ontario and Québec however this is often the case in a more mature, established tourism sector as compared to a province in the initial stages of supporting tourism with more rapid initial growth of the Indigenous tourism sector.

British Columbia

Province Overview

Tourism in BC is a key driver of the economy in the province. BC's tourism offerings attract over $20 billion in annual revenues and there are over 19,000 tourism-related businesses in operation in BC providing over 161,000 jobs. In 2018, tourism contributed more to GDP than any other primary resource industry such as forestry, mining, oil & gas and agriculture. [67]

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[67] Destination BC – Value of Tourism Snapshot – 2018 - https://www.destinationbc.ca/content/uploads/2020/03/2018-Value-of-Tourism_Feb-2020_Final.pdf

BC is also home to over 270,000 Indigenous people and 200 Indigenous communities in the province. This represents 6% of the entire BC population and is second only to Ontario for the highest provincial Indigenous population. More than 30 different First Nation languages and close to 60 dialects are spoken in the province. Sixty percent of BC's Indigenous population live off reserve and 44% live either in large or medium-sized urban centres.[68]

Indigenous tourism is well established in the province. Indigenous Tourism BC's 2018-19 Annual Report indicated that there are 401 Indigenous tourism businesses in BC which is over 200 more businesses than all the Atlantic provinces combined. Their annual report also shared that Indigenous tourism contributes $705 million in GDP and supports 7,400 full-time jobs.[69] The ITAC 2018 Indigenous tourism research indicated that Indigenous tourism attracts over $524 million in annual revenues. Only Ontario has higher performance numbers than BC. Indigenous tourism earns 3% of all the overall tourism revenue in BC. The number of Indigenous tourism businesses has grown by 12% from 2014 to 2018.[70]

There has been an Indigenous tourism marketing and development association in BC since 1996. This organization has played a key role in helping to bring BC to its current level of expertise and recognition for developing and promoting Indigenous-owned tourism experiences in the province.

Indigenous Tourism BC (ITBC)

Organizational Overview

INDIGENOUS TOURISM BC

Indigenous Tourism BC (ITBC) has been an established Indigenous tourism organization for the province of BC for over 22 years. The organization was established in 1996 by a core group of Indigenous volunteers involved in the tourism sector to share information, network and explore methods to strengthen the Indigenous tourism industry. Indigenous Tourism BC is a non-profit, stakeholder-based organization that is committed to "growing and promoting a sustainable, culturally rich Indigenous tourism industry."[71]

The organization initially was known as Aboriginal Tourism BC (ATBC) and they developed and implemented a comprehensive provincial strategy starting in 2005 called the Blueprint Strategy. This strategy focused on ensuring the plan was market-driven, operates within the industry expectations and sector requirements, is respectful of Indigenous protocol and cultures and delivers effective marketing and business development support.

ITBC's current 2019-20 organizational plan focuses on four key areas to continue to support and grow the industry:

- Marketing – ITBC delivers marketing programs dedicated to raising awareness of Indigenous tourism experiences in British Columbia.
- Experience Development – They provide programs for all stages of Indigenous experience and destination development including training, research, workshops and business readiness development programs.
- Partnerships & Special Projects – ITBC builds partnerships with communities and industry stakeholders developed to support for the development of Indigenous tourism opportunities;

[68] Statistics Canada – 2016 Census - https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-pr-eng.cfm?LANG=Eng&GK=PR&GC=59&TOPIC=9

[69] Indigenous Tourism BC - 2018-19 Annual Report - https://www.indigenousbc.com/corporate/content/uploads/2020/01/ABC260_2019_AnnualReport_V6_LR_single.pdf

[70] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

[71] Indigenous Tourism BC – Corporate webpage: https://www.indigenousbc.com/corporate/

examples of existing partnerships are Destination BC, Destination Canada and the BC Ministry of Tourism, Arts and Culture

- Leadership & Innovation – They advocate for support and recognition on behalf of the Indigenous tourism industry in the province. ITBC has established itself as a leader in successfully growing the Indigenous tourism industry as evidenced by the longstanding partnerships with the province and innovative marketing programs that are closely linked with the industry expertise of Destination BC.[72]

ITBC has specific programs that provide effective support directly to their members that are highlighted in their membership promotion package and on the organization's website.

The marketing program, for example, includes consumer website inclusion (which recently was relaunched: https://www.indigenousbc.com/), inclusion in the ITBC social media and online marketing program, ITBC media and influencer familiarization tours, marketing content production (images, videos), designation as Authentic Indigenous (stakeholders receive designation following a successful application process) and access to ITBC's Digital Asset Management System (images, videos). The level of marketing and promotional support from ITBC is the equivalent of the support offered by longstanding provincial destination marketing organizations for mainstream tourism and reflects the years of development and improvements to reflect the needs of their members/stakeholders.

Their tourism product/experience development programs are offered in three categories:

1) Destination Development - ITBC supports the tourism advancement of Indigenous communities by working with First Nations in key corridors and areas as well as with industry stakeholders such as Destination BC, the Regional Destination Marketing Organizations and other partners to develop successful Indigenous destinations in BC. This includes in-person delivery of engagement sessions in communities, development and implementation of collaborative agreements with First Nations that have made tourism development a priority and assisting Destination BC in the development of multiple 10-year destination development strategies in the province.
2) Training and Workshops – ITBC supports Indigenous communities to identify, create, and ensure quality visitor experiences with training and capacity development programs. They offer training for skills in customer service, communication, and marketing for Indigenous individuals, businesses, and communities. The workshops also include guidance in traditional Indigenous storytelling and hosting, FirstHost workshops which provide frontline service training with an Indigenous perspective and presentations on the value of tourism to help communities understand the potential opportunity of tourism.
3) ITBC Regional Specialists – ITBC has expanded their program and now have four Indigenous Regional Indigenous Tourism Specialists located in the Cariboo Chilcotin Coast, Northern British Columbia, Vancouver Island and Thompson Okanagan Regions; the specialists connect these diverse regions to tourism development opportunities based on current regional strategies and collaboration opportunities with industry stakeholders.

ITBC's association membership model is based on a stakeholder approach where they invite "Indigenous communities, emerging and existing Indigenous tourism businesses, Indigenous culture keepers and service providers, and supporters of Indigenous success in the tourism industry" to become stakeholders.[73]

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[72] Indigenous Tourism BC - Action Plan – 2019-20 - https://www.indigenousbc.com/corporate/content/uploads/2019/11/ITBC_ActionPlan_2019-2020_HR.pdf

[73] ITBC Corporate website - Stakeholder webpage - https://www.indigenousbc.com/corporate/stakeholders/

Stakeholders can apply to ITBC in one of six categories:

Non-Voting Stakeholders

1. Culture Keepers and Service Providers – This category is for: artisans, performers, storytellers, guides, designers, consultants, food and beverage, service providers or other Indigenous tourism professionals. There is no annual stakeholder fee for this category.
2. Communities and Entrepreneurs - Tier One – This category is for: Indigenous communities and Entrepreneurs starting a tourism business. This business is in-development and not yet visitor-ready. There is no annual stakeholder fee for this category.
3. Visitor-Ready and Indigenous-Owned Tourism Businesses - Tier Two – This category is for: businesses that are operational but do not have a market-ready experience / product. There is no annual stakeholder fee for this category.
4. Friends Of ITBC – This category is for: Non-Indigenous organizations related to tourism that support the Indigenous tourism industry. The annual stakeholder fee for this category is $499.

Voting Stakeholders

5. Market-Ready Indigenous-Owned Tourism Businesses - Tier Three – This category is for: tourism businesses that are fully operational meeting market-ready criteria. There is no fee for the 2020/21 Year in response to the COVID-19 crisis, typically this fee is $199.
6. Export-Ready Indigenous-Owned Tourism Businesses - Tier Four – This category is for: tourism businesses that are fully operational meeting export-ready criteria. There is no fee for the 2020/21 Year in response to the COVID-19 crisis, typically this fee is $199.

Organizational Financial Sustainability Approach

As an organization, ITBC has demonstrated their organizational sustainability through their ability to continue to operate for over 20 years. To better understand their organizational sustainability, it is important to review a key organizational success factor beyond programs offered and marketing efforts, their revenue sources that allows the organization to invest into staff and support programs.

In ITBC's 2019-20 Action Plan, the organization lists their four areas of focus, and within each area of focus they list their key activities and key performance indicators. The plan also shows the funded budget for these four areas of focus at $2.185 million.[74]

The 2018-19 ITBC Annual Report shows a budget of $2.219 million for that year showing a steady budget of approximately $2.2 million over the past two years. This annual report, however, does not share the source of funding and revenues to support the expenses. Looking back to the 2017-18 ITBC Action Plan we find an overview of the sources of funding. The total amount funded for that year was $2.152 million

Source of Funding	2017-2018 Confirmed
DBC	$1,000,000
INAC	$475,000
WED	$610,000
ATAC	$65,000
Other	$1,500
Total	$2,151,500

DBC -	Destination BC
INAC -	Indigenous & Northern Affairs Canada (now ISC)
WED -	Western Economic Diversification
ATAC -	Aboriginal Tourism Association of Canada (now ITAC)

2017-2018 ITBC Funding Summary (Source: 2017-18 ITBC Action Plan)

[74] Indigenous Tourism BC - Action Plan – 2019-20

which is very similar to the current ITBC budget allowing for some reasonable comparison to be made to analyze the funding sources and amounts.

The table above shows that in ITBC's fiscal year 2017-18, almost half (46%) of the funding for ITBC is provided by the provincial destination marketing organization, Destination BC. The remaining three largest funders are all Federal or national-level organizations: Indigenous Services Canada (22%), Western Economic Diversification (28%), and Indigenous Tourism Canada (3%).

Destination BC has been a supporting partner of ITBC for over 20 years and has consistently provided substantial support funding (both cash and in-kind support) to ITBC to allow the organization to invest in programs and projects in particular marketing and product development as this matches Destination BC's primary objectives for tourism success in BC.

In November 2019, ITBC announced they had signed an Indigenous Tourism Accord with the Province of British Columbia (represented by the Minister of Tourism, Arts and Culture). The ministry of Tourism, Arts and Culture funds Destination BC and flows their funding support for ITBC through Destination BC. According to the ITBC announcement, the Indigenous Tourism Accord "leverages the power of tourism to increase inclusiveness, promote Indigenous cultures, and preserve the rich heritage of the 203 Indigenous communities."[75] In the agreement, the Province and ITBC agree to work together to improve economic opportunities for Indigenous people, and provide Indigenous-owned businesses with resources, support and training to grow Indigenous tourism in BC. This agreement further solidifies the provincial commitment to support ITBC and their efforts into the future providing sustainability for the organization with a significant government partner.

As a consideration of a best practice for other provinces to consider, their partnership with their tourism ministry outlines key objectives developed by both ITBC and the Province, including increased Indigenous participation in tourism; revitalization of Indigenous cultures, protocols and languages; and collaboration between Indigenous and non-Indigenous tourism operators. They will also create a partnership group that includes representatives from ITBC, provincial ministries and Destination British Columbia and other Crown Corporations whose mandates support tourism. The partnership group will develop an implementation plan to translate the Accord into action, including terms of reference to guide its operations. This agreement between ITBC and the Province of BC demonstrates very targeted and relevant support designed to strengthen partnership, inspire action, and deliver results.

ITBC has developed plans over the past eight years to design and activate self-earned income streams for the association. This approach can help a not-for-profit find greater financial sustainability, demonstrate leadership and fund more support programs. One specific concept for ITBC is the Aboriginal Travel Services (ATS) project which was launched by ITBC in 2014. ATS is an Indigenous-owned online travel agency focused on the business and leisure needs of companies, organizations, and individuals throughout Canada. It was designed to promote and sell authentic Indigenous experiences while providing travel booking services such as hotels, car rentals, flights, and package deals. As a service to their stakeholders, ITBC Export-Ready Stakeholders can be packaged and sold by ATS. In ITBC's 2015-16 Annual Report, the financial summary indicated that ATS ran at a net deficit of $129,000. The ITBC 2017-2022 Corporate Plan indicates the plan for ATS is to "enhance Aboriginal Travel Services ability to sell leisure packages, and will develop exclusive partnerships with digitally competent travel trade who can report on sales."[76] The

AboriginalTravelServices.com

[75] ITBC News – November 2019 - https://www.indigenousbc.com/corporate/news/indigenous-tourism-bc-signs-indigenous-tourism-accord-with-the-province-of-british-columbia/

[76] ITBC Corporate Plan – 2017-2022 - https://www.indigenousbc.com/corporate/content/uploads/2019/11/AtBC_CorporatePlan2017-2022.pdf

2018-19 ITBC Action Plan does not mention ATS however in the 2019-20 ITBC Action Plan it states as a key activity to: “Review ability for Indigenous Travel Services to grow as a national social enterprise to generate a sustainable revenue stream”[77] The net deficit of ATS in 2015-16 and the intermittent reference to ATS in the past two annual action plans suggests ATS has not become a key driver for revenue however demonstrates leadership and proactive efforts on behalf of ITBC and also provides a service for ITBC export-ready stakeholders and their Indigenous tourism experiences for access directly to the marketplace.

ITBC has, through it’s 20+ years of active support of Indigenous tourism, growth of Indigenous tourism volumes in the province and on-going critical partnerships, demonstrated its key role in their ability to help British Columbia establish a strong and successful Indigenous tourism sector.

<u>The key best practices to learn from BC</u>:

- A well-funded provincial ministry responsible for tourism with strategic priorities that include active, direct support for Indigenous tourism.
- A critical success factor for BC is having an effective, long-standing Indigenous tourism organization with:
    - Significant and supportive partnership - ITBC has a long-standing with the BC Government Ministry of Tourism, Arts and Culture and Destination BC.
    - Targeted organizational planning - the organization has established annual action planning processes and five-year strategic planning cycles building on previous plans and an audit report measuring achievements as compared to the five-year strategic plans.
    - Member-focused - ITBC draws direction for action plans and programs from member engagement such as surveys of members and regional outreach with their regional representatives.
    - Community-based programs – presentations and workshops are specifically designed for Indigenous communities to consider the potential for tourism in their community; this effort builds on the existing economic development support already built into community leadership.
    - Advanced marketing programs - the multi-layered and multi-channel marketing delivered by ITBC on behalf of its stakeholders is intentional designed and planned to be in sync with provincial and regional destination marketing organizations
    - Consumer-centric business development – ITBC’s product and experience development support shows success based on its support different types of suppliers (both independent Indigenous entrepreneurs and community businesses) and businesses that celebrate the rich, living Indigenous culture of BC

Québec

Province Overview

The province of Québec welcomes approximately 34 million tourists each year totaling over 108 million overnight stays spending almost $10 billion annually. Almost 90% of tourists in Québec come from within Canada with almost 5% coming from outside of North America however those overseas guests account for almost 20% of annual tourism revenues for the province. For example, tourists travelling within Québec spend, on average, $181 per day while overseas guests spend over $1,800 per day.[78]

Québec has a large Indigenous population. In 2016, there were 182,890 Indigenous people in Québec, making up 2.3% of the population. There are 11 Nations living in 55 Indigenous communities in Québec with the largest three Nations by population being Innu, Cree and Mohawk. Sixty-four percent of

[77] Indigenous Tourism BC - Action Plan – 2019-20

[78] Tourism Quebec - Tourism in Quebec in brief – 2017 - http://www.tourisme.gouv.qc.ca/intelligence-affaires/tourisme-bref-2017.html

Québec's Indigenous population live off reserve and 68% live either in large or medium-sized urban centers. The Indigenous population in Québec, like other provinces, are younger than the non-Indigenous population; the average age of Indigenous people is five years younger than non-Indigenous and 22% of the Indigenous population is 14 and under in Québec.[79]

Indigenous tourism has been growing steadily over the past 10 years in Québec. Québec Aboriginal Tourism determined there were 154 Indigenous tourism businesses in Québec in 2011. Indigenous Tourism Canada's research shows that there are 217 Indigenous tourism businesses in 2017 for a 41% increase in just six years. Québec is the third-highest province with 217 businesses and Québec's top four types of Indigenous tourism businesses, based on ITAC's most recent research, were accommodations, recreation and outdoor adventure, arts and heritage, and travel services (retail etc.). Québec has a large number of recreation and outdoor adventure businesses compared to other provinces with an established sector however Québec is one of six provinces or territories with no Indigenous-owned gaming attractions.[80]

Indigenous tourism attracts over $298 million in annual revenues and supports over 4,000 jobs. Only Ontario and BC have higher performance numbers than Québec. Indigenous tourism in Québec provides 22 jobs per 1,000 of Indigenous population in the province and earns over 3% of all the overall tourism revenue in the province.

Since 1991, Québec has also had an Indigenous tourism marketing and development association, the longest standing Indigenous tourism association in Canada. This organization has played a key role in helping Québec organize, promote and develop Indigenous tourism.

Québec Aboriginal Tourism (QAT)

Organizational Overview

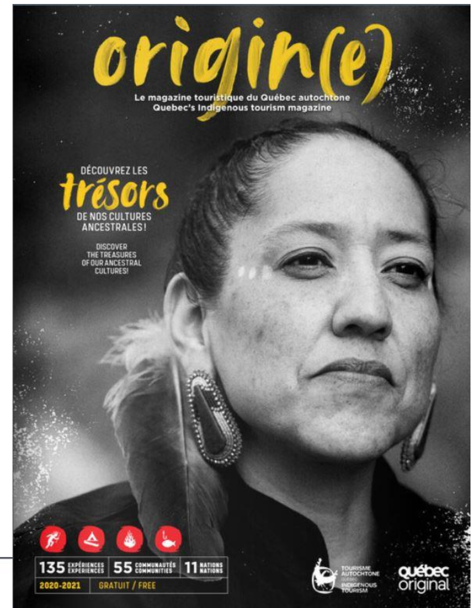
Québec Aboriginal Tourism is a tourism association recognized by Québec's ministry of tourism as the province's official representative of the Indigenous tourism industry. QAT was founded in 1991 as the Société Touristique Innu and was afterwards known as Québec Aboriginal Tourism Corporation (QATC) until 2010. The organization serves 55 different Indigenous communities having expanded from its original focus of Innu Nation, and then expanding to include the full 11 provincial Nations by the mid 1990's.

QAT's website states that QAT "contributes to the strengthening, preservation and promotion of the culture and traditions specific to each of the First Nations and Inuit communities." Their mission is: "to provide the Indigenous tourism entrepreneurs of Québec with a representative body that safeguards their interests, supports their development and offers a range of products and services that promote business development, improve business practices and increase their visibility in tourism markets". Their mandate is: structuring and supporting the development of the Indigenous tourism industry, supporting the development of best business practices and supporting the positioning and promotion of the Indigenous tourism products.[81]

The 2018-19 annual report for QAT summarizes the four key areas of focus for their organization.

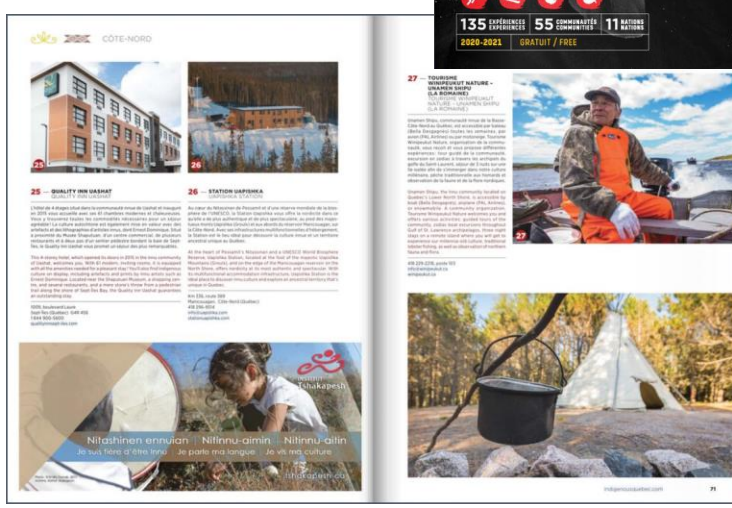
[79] Statistics Canada – 2016 Census - https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-pr-eng.cfm?LANG=Eng&GK=PR&GC=24&TOPIC=9
[80] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018
[81] QAT Research webpage: https://www.quebecaboriginal.com/tourisme-autochtone-quebec/statistic-link/

- Leadership & Partnerships – QAT focuses on tourism industry leadership and representation and with fund providers, strategic direction, developing expertise, creating partnerships, and supporting members' interests.
- Marketing – The organization delivers QAT's marketing and branding strategy, chairs an Indigenous traditions roundtable, exposure of Indigenous tourism in target markets through the travel trade, ad purchasing, and promotions via press and fam tours.
- Development – QAT supports entrepreneurs in alignment with business readiness phase, updating research, promoting the economic and social development benefits and supports the diversification and improvement of Indigenous tourism in the province.
- Communications – QAT communicates programs, activities, best business practices and enhancing visibility using multiple channels and techniques.[82]



QAT plans and activates specific programs that provide relevant support for their members highlighted in their annual report and on the organization's website.

The marketing program, for example, includes a QAT representative participating in 15 travel trade events in 2018-19 throughout North America, Europe and one event in China. Marketing to consumers includes multiple online channels including their consumer website that shares the business info for their members. One stand-out annual project is the publication of Origin(e), a 100+ page guide to Indigenous tourism in Québec which displays their members and shares stories about Indigenous experiences. The 2020-21 guide represents 135 experiences and uses the first 40 pages to introduce Indigenous tourism with stories and images of examples of Indigenous tourism in Québec. This guide is not a net revenue-generating project; it is provided as a promotional service to QAT members and sells ads to help offset a portion of the costs of production.



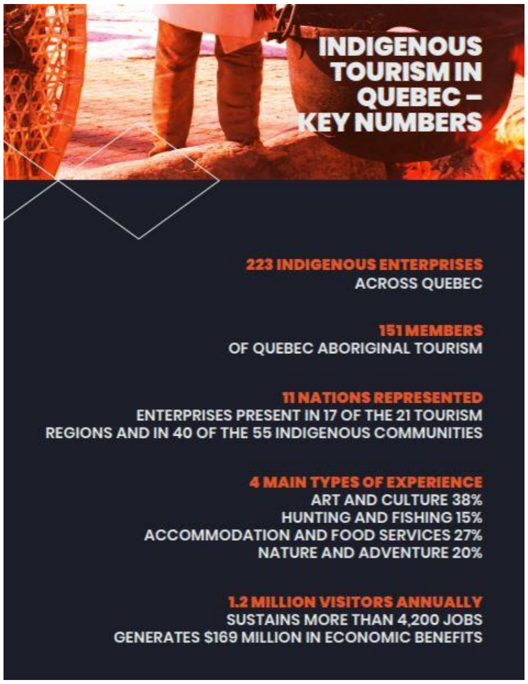
Source: QAT Website - www.quebecaboriginal.com

QAT's product and experience development programs are highlighted by an extensive number of partnerships to help support business development within specific tourism sectors and in various regions of the province. For example, QAT collaborated with the Québec Outfitters Federation and Aventure Écotourisme Québec to deliver a business accelerator project to grow business development in nature and adventure tourism. Another partnership is with the Association touristique régionale de la Côte-Nord. The partnership will promote the support services on the north shore of the province leading to an increase in the number of Indigenous projects. QAT also partnered with the ÉCONOMUSÉE Network Society to drive Indigenous ÉCONOMUSÉE projects in Québec.

[82] QAT Annual Report 2018-19 - https://www.quebecaboriginal.com/root-blog/wp-content/uploads//2020/01/TAQ_Rapport-annuel_18-19_EN_FINAL.pdf

QAT's membership as of 2019 is at 151 members of the 217 Indigenous tourism businesses in the province. Members of QAT cover all 11 Nations in the province and 40 of the 55 Indigenous communities in Québec. The four main types of experiences in QAT's membership are arts & culture, hunting & fishing, accommodations and food services and nature & adventure.[83]

There are three main membership categories at QAT. 1) Active Member - The active member participates in QAT programs and is a majority Indigenous-owned tourism business or corporation. Examples: entrepreneurs, festivals, inns, museums, tourist shops, etc. An auxiliary member (a sub-category of the active member) must operate an Indigenous-owned tourism business or corporation. An auxiliary member is a newer business and must have been launched or incorporated within the last two years. 2) Associate Member - The associate member supports QAT's mission and objectives however is a non-Indigenous business or organization interested in QAT's objectives and projects and involved in the professional activities of active members. Examples: service providers, collaborators, sectoral tourism organizations, regional tourism organizations, etc. 3) Delegate Member - The delegate member supports QAT's mission and objectives. It must be a band council or an Indigenous organization other than a tourism business and must show an interest in QAT's activities. Examples: Government, Band Council, development agency, economic development entity, Indigenous organization, etc. Rates for QAT membership range from $225/year to $550/year which differs significantly from the stakeholder fees for ITBC which is $0 for businesses in development and $199 for market-ready businesses participating in ITBC marketing programs. It is estimated that QAT earns approximately $50,000 per year in membership dues which is less than 5% of the annual QAT expenditures.[84]



Source: QAT Annual Report 2019-20

The level of their members' business readiness is not factored into QAT's membership categories as is the case with ITBC. QAT divides its three membership categories simply by if a business is an Indigenous tourism business, a non-Indigenous business supporting Indigenous tourism, or an Indigenous supporting organization.

Organizational Financial Sustainability Approach

QAT has been active for almost 30 years demonstrating a consistent and valued effort and support service provided a) to their members and b) to their funders and partners. Part of this longevity can be attributed to longstanding partnerships and funding agreements centered around their ability to show value, reliability, and leadership.

QAT has established a diverse range of funders in their efforts to adjust to various levels of funding available from one year to the next from their funding sources. QAT also has a mix of core and project-based funding with the majority of the funding coming in the form of project funding with 5% to 10% of that funding supporting their core operating expenses. QAT also receives core support funding through their partnerships with ITAC and the Québec provincial Ministry of Native Affairs.

Based on a summarized version of the QAT 2018-19 operating budget provided by QAT on request, the annual operating budget for QAT is $1.22 million which is its largest annual budget in the history of the

[83] Ibid

[84] QAT Membership Information Kit 2020-21 - http://www.tourismeautochtone.com/root-blog/wp-content/uploads/2019/11/TAQ-Kitmedia-2020-2021_AN.pdf

organization. A significant portion of that annual budget is directly invested in marketing efforts (almost $670,000) on behalf of their members. The organization has a team of six staff and representatives of QAT sit on over 10 industry Boards or working groups demonstrating a high level of broader tourism industry involvement and leadership.

QAT's funding partners granted $947,000 in 2018/19 and their funders include the federal government ($471,000), provincial government ($132,000), Indigenous Tourism Assoc. of Canada ($200,000) and Tourism Québec ($145,000).

QAT has a five-year funding agreement with the Québec provincial Ministry of Tourism and is currently under negotiations for the next five-year term.[85]

Although 78% of QAT's 2018/19 budget was funded through funding agreements and partnership, QAT also earns income through several channels: Membership dues, advertising sales, delivery of tours, special event revenue, service agreements and miscellaneous revenue totaling over $260,000 which is over 21% of their overall revenue earnings for the year. Important to note, the majority of the self-earned income is directly expensed in the delivery of services with limited net bottom-line gains for the organization to spend as needed. For example, QAT earns $92,000 in advertising for three publications however their printing costs alone for those publications is $78,000.

In March 2017, the Québec provincial government announced $70 million in funding for the "2017-2020 Tourism Investment Plan" which includes $70 million of funding for tourism development around five key business sectors. Indigenous tourism is specifically mentioned in two of those business sectors: Events Tourism – Strengthening Indigenous experiences and Nature and Adventure Tourism – Support initiatives highlighting Indigenous culture and adventure.[86]

<u>The key best practices to learn from Québec</u>:

- A provincial tourism ministry that demonstrates a long-term commitment to Indigenous tourism to help them achieve their goals with support that includes close partnership, collaboration, and consistent funding support for Indigenous tourism.
- A provincial tourism association dedicated solely to Indigenous-owned tourism that has been in place for almost 30 years. QAT distinguishes itself through highly developed support programs and approaches including:
    - QAT uses many industry partnerships to allow functional and relevant programs to be developed and delivered
    - Like BC, QAT uses a regional approach to support programs such as product enhancement and development to reflect distinctive and unique regional conditions
    - With a specific focus on tourism industry representation through committee participation, sitting on relevant boards and attending a broad number of industry meetings and workshops, QAT has establish a strong reputation in Québec's overall tourism sector providing greater opportunity for partnerships and collaboration
    - QAT designs marketing programs that provide real and direct value to their members helping to maintain strong membership support, participation, and retention.

[85] QAT Annual Report 2018-19

[86] Quebec Ministry of Tourism - Plan D'Investissement en Tourisme 2017-2020 - http://www.tourisme.gouv.qc.ca/publications/media/document/ministere/schema-plan-investissement-2017-2020.pdf

Yukon

Province Overview

Yukon has a diverse mix of history, natural ecosystems, and culture. The many natural attributes of Yukon attract approximately 323,000 overnight stays and, for the first time in Yukon's history, direct international border crossings into Yukon in 2018 surpassed half a million, representing 15% growth over Yukon's last record number from 2017. Airline passengers in 2018 grew by over 10% to 393,000 as compared to 2017. Restaurant revenues grew by 4% over 2017 and retail sales grew by almost 5%. Almost 70% of overnight visitors to Yukon are from the US and just 13% come from within Canada. The largest growth in overnight visitors are international/overseas guests growing over 5% in 2018.[87]

There are 14 Yukon First Nations and eight language groups in the territory. Yukon's Indigenous population makes up over 23% of the entire population of the territory. It is the third highest percentage in Canada and behind only Nunavut and NWT. Of the Indigenous population in Yukon, 81.6% were First Nations people, 12.4% were Métis, and 2.7% were Inuit. Fifty-three percent of Indigenous people in Yukon live in a rural area and over 23% of the Indigenous population in the territory are aged fourteen and under.[88]

Indigenous tourism in Yukon has been established for many years and has been growing steadily recently with increased awareness of product and greater promotional efforts. With almost a quarter of the Yukon population being Indigenous, many Indigenous businesses have evolved to take advantage of international guests to Yukon who have a significant level of interest in an Indigenous cultural experience during their visit. ITAC's national Indigenous tourism research updated in 2018 showed that Yukon has 82 Indigenous-owned businesses which was a significant 30.5% growth in just four years since 2014. The research also determined that Indigenous tourism brings in $83.5 million in revenues each year which is 10% of what all tourism earns in the territory. Indigenous tourism provides over 970 jobs in Yukon which means that the industry provides almost 119 jobs per 1,000 Indigenous population in the territory. Overall, Canada provides 23 jobs in Indigenous tourism per 1,000 of Indigenous population. The top four types of businesses, based on ITAC's most recent research, were arts and heritage, accommodations, recreation and outdoor adventure, and travel services (retail etc.). Well over half of all Indigenous tourism businesses in Yukon are categorized as arts & heritage which typically represents cultural centres and museums.[89]

Yukon has had an Indigenous-focused tourism association for over 15 years. The current organization, the Yukon First Nation Cultural Tourism Association (YFNCTA) was formed in 2013 when YFNCTA merged with the Adäka Cultural Society.

Yukon First Nation Culture & Tourism Association (YFNCT)

<u>Organizational Overview</u>

The association was incorporated in Yukon territory in 1994 (former name was Yukon First Nations Association) and it published its first Indigenous tourism guidebook in 2001. Six Indigenous cultural centres and museums opened in Yukon in the 1990's and early 2000's including the Dänojà Zho Cultural Centre in Tr'ondëk Hwëch'in and the Big Jonathan House in Selkirk First Nation in 1998. The association created another guidebook in 2007 and the annual Adäka Cultural Festival began in 2011.

The current YFNCT constitution and by-laws share the organization's vison, mandate and goals:

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[87] Tourism Yukon – Year-End Report – 2018 - https://yukon.ca/sites/yukon.ca/files/tc/tc-tourism-yukon-2018-year-end-report.pdf

[88] Statistics Canada – 2016 Census - https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-pr-eng.cfm?LANG=Eng&GK=PR&GC=60&TOPIC=9

[89] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

Vision – Unify and strengthen Yukon First Nations communities creating pride, renowned artists, and inspiring experiences that attract visitors from around the world.
Mandate – To foster the development of vibrant and sustainable Yukon First Nations arts, culture and tourism sectors.
Goals:

Marketing & Communications – Increase understanding, awareness and demand of YFN arts, culture and tourism experiences within and beyond Yukon.

Product Development – Support the development, enhancement and delivery/presentation of authentic, YFN arts, culture and tourism products and experiences.

Networking and Partnership – Build strong linkages between sector stakeholders to increase collaboration, leverage resources and create new opportunities.

Advocacy – Be a unified voice to influence, promote and assist the development of YFN arts, culture and tourism sectors within Yukon.[90]

YFNCT shared an overview of the strategic plan for their organization at the 2017 Advancing Indigenous Tourism Conference held in Whitehorse and hosted by YFNCT. Their presentation, available online from YFNCT's website, lists their seven priorities for their organization:

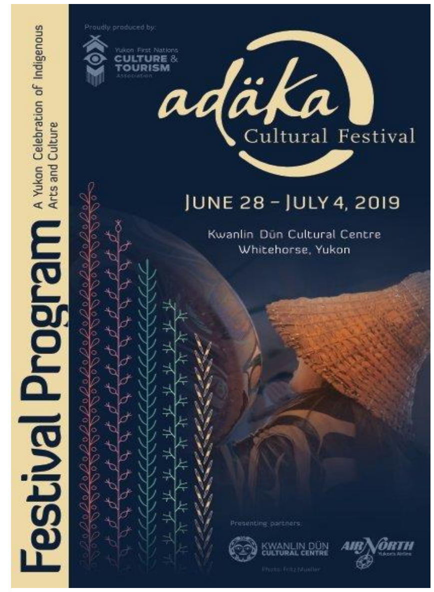
1. A hub for artists and entrepreneurs who want to share their arts, culture and heritage – centralized information for our members including artists, cultural centres, tourism entrepreneurs and partners
2. Professional / Business Development – marketing bootcamp, attendance at national Indigenous tourism conference
3. Training & Skills Development – arts training (i.e.: fashion design) and Yukon Indigenous tourism conference
4. Marketing & Awareness - marketing tools for artists (product tags, stickers, brochures), buyers guide for public, pricing guide for artists, point of sale materials for retailers and galleries, travel trade shows, familiarization tours for trade and media, co-op marketing program
5. Arts Presentation - Adäka Cultural Festival and ad hoc cultural exchanges
6. Partnerships – collaborative projects with partners to expand awareness
7. Advocacy – leadership and representation with ITAC and an active membership program

The current Indigenous tourism guide was produced in 2018 and is the first guide produced since 2007. The 52-page guide introduces Indigenous tourism to the reader and provides listings of market-ready businesses and events. The guide also worked with all 14 First Nations in Yukon and includes a double page spread on each First Nation, highlighting their unique history and culture, language, community voices, and the 'Top 5 Things To Do' in each community. YFNCT produced a print run of 70-000 copies to be distributed across the territory and will be available for pick up at Visitor Information Centers and Cultural Centres. Of the 52 pages, however, just six pages provide business listings with no pictures of the experiences. A much bigger portion of the guide is dedicated to the profiles of the 14 First Nations taking up 28 pages of the guide. These 28 pages provide a mix of First Nation history and activities that relate to interesting locations, events and some businesses.

Indigenous Tourism Guide Source: YFNCT

[90] YFNCT – Constitution & Bylaws – 2018 - http://www.yfnct.ca/pdf/Resources_Documents/YFNCT%20Bylaws%20and%20Constitution.pdf

The Adäka Cultural Festival is a large part of the annual efforts and promotion for YFNCT. The annual festival has been running since 2011 and the festival formally became part of the YFNCT organization in 2013. The festival is held each summer at the Kwanlin Dün Cultural Centre in Whitehorse. The festival mission to develop and deliver a world-class, iconic festival that showcases, celebrates, and fosters the development of Yukon's diverse and distinctive First Nations arts and culture. The 2019 festival was held over five days featured close to 250 performing artists, 80 visual artists and 35 knowledge keepers, presenters, and film makers and event organizers estimated over 10,000 festival visitors.[91]



Adäka Cultural Festival Program - 2019
Source: YFNCT

YFNCT is a member-based organization and offers membership with an annual fee from $25 to $250. The member program focuses on artists and Indigenous tourism businesses and the benefits are based on five key areas: 1) Access to YFNCT Networks - inclusion in YFNCT networks to connect with other stakeholders in the arts, culture and tourism sectors, 2) Partnership Opportunities - partner in YFNCT special events, trade shows, and annual gatherings, 3) Promotional Opportunities - member spotlights on YFNCT social media and inclusion in e-updates, events and tradeshows, 4) Access to Markets, Events & Tradeshows - ie. representation at Rendezvous Canada, Heard Indian Market, CANDO, Arctic Indigenous Investment Conference, etc., 5) Professional Development Support - assistance with market and export readiness, business planning, brand and product development, funding applications and licensing. The membership fees are set based on the size of the organization measured by number of employees. For example, a single entrepreneur is $25 and up to $200 for an enhanced membership for businesses with six or more employees. Tourism organizations and public service/government memberships are $150 to $250. The YFNCT membership webpage shows 38 Indigenous artist and business members with another seven industry partners, nine program partners and five funding partners.[92]

<u>Organizational Financial Sustainability Approach</u>

The organization lists five funding partners who provide specific cash and in-kind support to YFNCT's programs and activities: Canadian Northern Economic Development Agency, Government of Canada, Government of Yukon –Economic Development, Government of Yukon – Education, Government of Yukon – Tourism & Culture.

In December 2018, YFNCT announced an important renewal of a partnership with the Government of Yukon. The Government of Yukon, the Indigenous Tourism Association of Canada (ITAC) and YFNCT signed a memorandum of understanding at the Advancing Indigenous Tourism Conference held in Carcross, YT. As stated in the news release, "The MOU sets the foundation for a collaborative partnership between the organizations as they work towards 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."[93]

The MOU lists six strategic priorities:

1) Establishing Yukon as a premier destination for Indigenous tourism,
2) Supporting the development of sustainable, market-ready and export-ready Indigenous experiences,

[91] Adäka Cultural Festival Website – Festival Info webpage - https://adakafestival.ca/festival
[92] YFNCT Corporate Website – Membership webpage - http://yfnct.ca/membership-partners
[93] YFNCT Corporate Website – News webpage - http://www.yfnct.ca/news/2018-12-13-news-release-memorandum-of-understanding-signed-to-support-indigenous-tourism

3) Increasing awareness and demand for Indigenous tourism experiences in Yukon,
4) Maintaining and celebrating the authentic cultures and communities of the Yukon,
5) Supporting and facilitating involvement of Yukon First Nations communities in Indigenous tourism development, and
6) Aligning the Parties' strategies to leverage funding and maximize opportunities.

This renewed partnership with their primary funding organization, in alliance with the national Indigenous tourism organization, demonstrates a commitment from the territorial government to continue to support YFNCT's efforts. The MOU clarifies the key elements of the partnership priorities which shows the government's expectations and areas of focus they wish to see in this partnership. The addition of ITAC, the national Indigenous tourism association, suggests a further level of strategic alignment and leadership support in efforts to successfully achieve the partnership priorities.

Similar to both BC and Quebec, this territorial association will depend significantly on their partnership with their provincial/territorial government. The longevity of that partnership typically depends on the ability to both satisfy the funder's expectations and have an ability to adjust activities to match shifting government priorities.

The key best practices to learn from Yukon:

- The types of Indigenous tourism experiences in Yukon reflect the natural and cultural offerings of the territory. A visitor to Yukon typically is looking for an outdoor adventure and unique culture and Indigenous tourism product development in the territory reflects this visitor expectation
- The territorial Indigenous tourism association has been established for over 20 years with business support programs that have evolved to match both the needs of their members as well as the demands of the marketplace:
    - YFNCT supports businesses with a hands-on approach to assist with programs designed to support their members where it is most needed including marketing/promotions, training, and funding research.
    - The organization produces a large annual event with a growing attendance which provides excellent awareness and exposure for Indigenous tourism for the entire territory and also builds partnerships with sponsors, supporters and the community.
    - YFNCT has welcomed revisions to their organizational mandate to help ensure a healthy renewed relationship with their primary funder, the Government of Yukon.
    - The 14 Indigenous communities of Yukon are actively involved in and support the promotion and development of Indigenous tourism as evidenced by their significant participation in the Indigenous tourism guide and the annual festival.
    - Similar to ITBC, YFNCT makes membership very affordable for small businesses to provide them access to the benefits of being a part of YFNCT.

Ontario

Province Overview

Ontario has the largest tourism industry of any province or territory in Canada. With $34.1 billion in tourism revenue in Ontario in 2018, the province has more tourism earnings than BC and Quebec combined and six times more revenue generation than all the Atlantic provinces combined. In 2018 tourism contributed $32.7 billion to provincial GDP through 188,000 tourism businesses, 391,000 tourism jobs and 144 million annual visits.[94] Over 78% of Ontario's visitors originate from within Canada, 17% from the US and 5% from overseas. In 2019, the top overseas countries in terms of volume of

[94] Tourism Industry Association of Ontario Website – Research webpage - https://www.tiaontario.ca/cpages/tourismquickfacts

visitors are, in order: U.K., China, Mexico, India and Germany. The top four overseas countries of origin all had 15% or higher increases in volume of visitors in 2019 as compared to the previous year.[95]

Ontario's population is the highest of any province; the Indigenous population in the province is also the highest in the country. In 2016, Ontario had over 374,000 Indigenous people in the province making up 2.8% of the population. Of the Indigenous population in Ontario, 63% were First Nations people, 32% were Métis, and 1% were Inuit. Thirty-three percent live in large urban centers with 84,000 Indigenous people living in either Toronto or Ottawa; 65% live off-reserve. Just 8% of the population are 65 or older while 24% are 14 or younger.[96]

Indigenous tourism in Ontario represents the largest collection of Indigenous-owned businesses of any province or territory in Canada. The ITAC 2018 national research conducted by the Conference Board of Canada indicated that there are 558 Indigenous tourism businesses in Ontario which represents 30% of all the tourism businesses in the country. Ontario's Indigenous tourism attracts over $1.37 billion in annual revenues which represents 4% of all the overall tourism revenue in the province. The number of Indigenous tourism businesses has grown by 16% from 2014 to 2018 and Indigenous tourism provides 13,000 jobs which is 34.5 jobs per 1,000 Indigenous population in Ontario. The top five types of Indigenous tourism in Ontario are, in order: travel services (retail), arts & heritage, food & beverage, accommodations, and recreation & outdoor adventure.[97]

Ontario has recently begun the process of establishing an Indigenous tourism association for the province and formally incorporated their association in 2016; it is moving forward with research, strategic planning, partnerships, and funding outreach.

Indigenous Tourism Ontario (ITO)

Organizational Overview

The association was incorporated in 2016 however there have been regional Indigenous tourism organizations in Ontario prior to ITO. The Northern Ontario Native Tourism Association (NONTA) was formed in 1987 representing Indigenous tourism for the north and was based in Thunder Bay. 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. Both of these organizations ceased operations by 2008.

In 2015, ITO completed its 5-year organizational strategy, establishing a vision for the year 2020. The mission of ITO as shared in their strategy is to assist Indigenous communities and entrepreneurs with programs that build capacity to produce high quality products and services. The measurable goals of the 2020 strategy are to create 1,160 new jobs with over $12 billion in total output and $6.7 billion in GDP to Ontario's economy by 2020. ITO's strategy also identifies four key strategic goals: 1) Developing organizational sustainability and brand integrity, 2) Building capacity and increasing economic opportunities, 3) Marketing and branding authentic products and services and 4) Providing support for communities and entrepreneurs.[98]

Since the development of ITO's 2020 strategy in 2015, ITO has begun delivering key initiatives identified in the strategy. In 2017, ITO rebranded and activated new marketing activities, launched membership,

[95] Ontario Ministry of Heritage, Sport, Tourism and Cultural Industries – Tourism Research - http://www.mtc.gov.on.ca/en/research/performance/performance.shtml

[96] Statistics Canada – 2016 Census - https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-pr-eng.cfm?LANG=Eng&GK=PR&GC=35&TOPIC=9

[97] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

[98] Indigenous Tourism Ontario – 2020 Strategy – 2015 - https://indigenoustourismontario.ca/wp-content/uploads/2018/10/Final-ITO-Strategy-Interactive.pdf

established capacity building programs and launched the Ontario Authentic Indigenous Moments program. ITO currently has a total of three staff, an executive director and two project coordinators representing the northern and southern regions of Ontario. In 2018, ITO opened its first permanent office near Little Current on Manitoulin Island.

In addition to the newly developed corporate and consumer websites and social media channels, ITA has also launched their Ontario Authentic Indigenous Moments (OAIM) program. This program links authentic cultural entrepreneurs with tourists who are seeking a unique experience. The website, www.OntarioIndigenousMoments.ca, promotes local Indigenous entrepreneurs and organizations and highlights cultural experiences throughout Ontario and includes an online booking option. The website, however, lists just five experiences as of April 2020.

Source: ITO Website

ITO is also developing a Cultural Authenticity program (CAP) in partnership with Canadian Ecotourism Services. The program is designed to showcase authentic Indigenous tourism experiences however the online sign-up link has not yet been launched. 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.[99]

With this program, ITO intends to support and promote businesses offering culturally authentic experiences and recognize them for contributing to their Indigenous heritage.

Currently, ITO does not offer ongoing recurring programs in training and product development however offer custom solutions for businesses by contacting ITO.

ITO is a member-based organization and they welcome any person or organization that has an interest in advancing Indigenous tourism in Ontario to become a member. Members can participate in ITO marketing, sales, and business development programs. Members who are ready to host visitors (visitor-ready) and are majority Indigenous-owned will be listed on ITO's website and may be featured on the Ontario Indigenous Moments website if they meet the criteria. ITO is offering free ITO membership for 2020 considering the COVID-19 pandemic.

To be a voting member of ITO, a business must be tourism-focused and majority Indigenous owned and "is deemed by ITO to be able to host visitors and meets or exceeds the quality assurance and cultural authenticity standards established by ITO".[100] Voting membership is also offered to organizations or associations who are majority managed by Indigenous directors and represents majority Indigenous-owned tourism businesses. Non-voting members of ITO are non-Indigenous owned businesses, organizations or associations who wish to support ITO's vision and mission. Non-voting members are also Indigenous-owned businesses that are in start-up stage or are developing, expanding, or upgrading their business. ITO's online membership directory shows 47 voting members and over 210 non-voting members.

[99] Ontario's Indigenous Tourism Landscape Foundational Research Study 2019 - https://indigenoustourismontario.ca/wp-content/uploads/2019/04/Foundational-Research-Study-2019-DRAFT-v2-.pdf

[100] Indigenous Tourism Ontario Website – Membership webpage - https://indigenoustourismontario.ca/membership/ito-membership/

ITO's Board of Directors advise the ITO Executive Director and are made up of four people who have extensive and varied experience in tourism. Two of the directors are Indigenous with leadership roles and tourism experience and the other two Directors are non-Indigenous and represent academia and public sector tourism economic development.

Organizational Financial Sustainability Approach

ITO is in the start-up phase of their organization. They have established a strategy, activated some initial programs and are reaching out to build a membership. A critical stage of start-up is also establishing key partnerships for in-kind and cash support as well as collaboration and assistance with organizational development. The ITO corporate website lists three key partners: Destination Ontario, Destination Northern Ontario and Indigenous Experience Ontario.

ITO signed a memo of understanding in October 2018 with the Tourism Industry Association of Ontario (TIAO) to assist in their efforts to grow the authentic Indigenous market and export-ready businesses in Ontario. This agreement recognized contributions both TIAO and ITO have made to Ontario's tourism industry and confirmed the collaboration between the two provincial organizations moving forward. The MOU also acknowledged Ontario's potential for development and international promotion of Indigenous tourism products.[101] The announcement did not provide any details of financial contribution.

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

ITO's partnership with the national Indigenous tourism organization, ITAC, includes an annual contribution of $65,000 to, according to ITAC, "build and strengthen the development of industry-led, provincial & territorial Indigenous tourism associations".[102] ITAC's funding support also comes in the form of product development grants to Indigenous tourism businesses in Canada, including Ontario.

The key best practices to learn from Ontario:

- Ontario is a rare example of a province with an established Indigenous tourism industry and significant growth over the past five years but does not have an active and funded Indigenous tourism organization. This suggests that a level of industry development can be achieved through existing channels of support including Indigenous community economic development support and Indigenous business support.
- ITO, the provincial Indigenous tourism association, is establishing itself as a support organization for Indigenous-owned tourism businesses by focusing on:
    - Having a strategy that is building on understanding the needs of the operators and business owners as well as the demands of the marketplace through extensive research
    - Marketing programs and initiatives that reflect the unique authenticity of Indigenous cultural sharing
    - Promotional efforts to grow awareness and understanding of Indigenous tourism experiences available in the province
    - Membership programs designed to provide clear value with a low cost as a membership base is built
    - Regional focus using project coordinators specifically assigned to the northern and southern region
    - Partnerships to build collaboration and to attract in-kind and cash support

[101] Tourism Industry Association of Ontario – News Articles webpage - https://www.tiaontario.ca/articles/the-tourism-industry-association-of-ontario-tiao-and-indigenous-tourism-ontario-ito-sign-memorandum-of-understanding-at-2018-ontario-tourism-summit

[102] ITAC Website – Association Funding webpage - https://indigenoustourism.ca/corporate/2017-18-funding-application-provinces-territories-existing-aboriginal-tourism-association/

Canada

National Overview

Tourism in Canada has grown significantly and according to Statistics Canada, Canada welcomed 22.1 million inbound visitors in 2019, marking the sixth consecutive year of increased travel to Canada. Overseas visitors reached an all-time high of 6.7 million representing 32% of total international arrivals. Tourism generates total revenues in the order of $98 billion annually and accounts for 2% of Canada's GDP. The tourism sector contributed an estimated $27 billion in tax revenues across all levels of government in 2017 and it is also one of Canada's most geographically diversified sectors, with a significant presence in all of Canada's provinces and territories.[103]

Indigenous tourism has also been growing significantly across Canada and the industry now has almost 1,900 Indigenous-owned businesses across the Canada which has grown by 16.5% since 2014. Canada's Indigenous tourism industry earns $3.8 billion in annual revenues and supports over 39,000 jobs. The Indigenous tourism industry represents almost 4% of the national overall tourism industry based on total revenues. Across the country, most Indigenous tourism businesses are arts & heritage, accommodation, travel services (retail) and recreation & outdoor adventure. There are also 35 gaming attractions in Canada with majority Indigenous ownership.

Canada has a national Indigenous tourism association, the Indigenous Tourism Association of Canada (ITAC) and was incorporated in 2015 as the Aboriginal Tourism Association of Canada which was then formally changed replacing Aboriginal with Indigenous in 2017.

Indigenous Tourism Association of Canada (ITAC)

Organizational Overview

Prior to incorporation as an Indigenous-controlled tourism support organization, ITAC was a more informal organization known as the Aboriginal Tourism Marketing Circle (ATMC). The members of this group supported Indigenous tourism growth and development.

INDIGENOUS
TOURISM ASSOCIATION OF CANADA

The initial stages of forming organization included a national research study completed in 2014 to develop an understanding of the Indigenous tourism industry in Canada, understand tourism industry trends, identify opportunities and challenges associated with these trends, and determine the direction and needs of Canada's Indigenous tourism industry to move forward.[104] From this research and with significant input from the members of the ATMC, a five-year organizational strategy was created to provide focus and priority of ITAC's efforts towards tourism experience development and marketing through leadership and partnership at a national level. The targets for ITAC's first strategic plan were to increase revenues, grow jobs and expand the number of successful businesses.[105] This plan was used to create numerous industry partnerships including funding relationships with Indigenous and Northern Affairs Canada (now known as Indigenous Services Canada) and Destination Canada.

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[103] Destination Canada – Unlocking the Potential of Canada's Visitor Economy December 2018 - https://www.destinationcanada.com/sites/default/files/archive/804-Unlocking%20the%20Potential%20of%20Canadas%20Visitor%20Economy/Unlocking%20the%20Potential%20of%20Canadas%20Visitor%20Economy_WEB.pdf

[104] ITAC - National Aboriginal Tourism Research Project 2015 - https://indigenoustourism.ca/corporate/national-aboriginal-tourism-research-report-2015/

[105] ITAC – The Path Forward, 2016-2021 Strategic Plan - https://indigenoustourism.ca/corporate/wp-content/uploads/2018/04/itac-five-year-plan-2016-2021-web.pdf

ITAC updated the national research in 2018 which showed significant growth in the Indigenous tourism industry since 2014 in areas including jobs, number of Indigenous-owned tourism businesses and revenues. From this new and updated research completed by the Conference Board of Canada, ITAC produced an updated strategy with updated economic indicator goals however it was built on the same strategic pillars as the initial strategy: marketing, development, partnerships and leadership.

ITAC's mission is to provide leadership in the development and marketing of authentic Indigenous tourism experiences through innovative partnerships. Their vision is to achieve a thriving Indigenous tourism economy sharing authentic, memorable, and enriching experiences. The new five-year strategic plan to accelerate the growth of Indigenous tourism in Canada has set specific targets to reach by 2024:

- Total Indigenous Tourism Revenues in Annual Canadian GDP: increase of $800 million to $2.2 billion
- Total Indigenous Tourism Jobs: increase to 49,383
- Total Export-Ready Indigenous Tourism Experiences: increase to 200

At the 2019 International Indigenous Tourism Conference produced by ITAC and held in Kelowna, BC, ITAC provided an overview of their new strategy. Within this presentation, ITAC highlighted several programs and initiatives:

- A new investment strategy for Indigenous tourism in Canada; ITAC's new strategic plan shows an average budget of $14.64 million per year from 2021 to 2024 including $3 million per year for investment into provincial Indigenous tourism organizations
- Expanding the annual International Indigenous Tourism Conference
- Expanding the micro-grant program for businesses to improve/upgrade their market readiness
- Project with Tourism HR Canada "Rise" to research and support business readiness and preparation
- Support for provincial/territorial Indigenous tourism strategies
- Expand the marketing tools to assist operators

Source: ITAC Presentation at IITC 2019

- Expand direct marketing to consumers and grow travel trade relationships
- Production of 'Nations', a lifestyle magazine showcasing Indigenous experiences
- Launching a new industry brand: 'Destination Indigenous'[106]

One of ITAC's most valuable in-kind resources it offers is their recently update National Guidelines to assist with development of authentic Indigenous tourism experiences for the marketplace. It is designed to be a resource tool to help businesses develop and deliver a "market ready" and authentic product. The guide contains valuable information, checklists, and development best practices. A guide also includes a self-assessment to help develop, deliver, and price an authentic Indigenous tourism experience and to improve the quality of the visitor experience and growth for your tourism experience.[107]

[106] ITAC – IITC Website – Presentations webpage - https://indigenoustourismconference.com/past-event/2019-international-indigenous-tourism-conference/

[107] ITAC National Guidelines – 2018 - https://indigenoustourism.ca/corporate/national-guidelines/

One of the priorities for ITAC moving forward is also to build their membership size and the services & benefits to members. ITAC has, overall, 644 members with 112 'Marketing Upgrade' members. ITAC provides an online listing of their members divided my province/territory and voting/non-voting. In the attached table, as of April 2020, the membership directory shows 584 total members with 273 voting members.

ITAC Membership by Prov./Terr.

Prov./ Terr.	Voting	Non-Voting	Total
AB	14	22	36
BC	36	39	75
MB	5	20	25
NB	3	6	9
NL	15	7	22
NT	9	5	14
NS	3	6	9
NU	1	1	2
ON	78	160	238
PE	1	3	4
QC	97	29	126
SK	5	5	10
YK	6	8	14
Canada	273	311	584

Source: ITAC Website (as of Apr. 2020)

ITAC has multiple membership categories within both the voting and non-voting membership divisions. To be a voting member, the applicant must be majority Indigenous owned and be, at minimum, market ready. Voting membership is also provided to Indigenous tourism associations that are majority managed by Indigenous directors and represent Indigenous-owned businesses. Non-voting membership categories are Indigenous businesses who have not yet achieved market-readiness or a non-Indigenous or Indigenous business that wishes to support and/or partner with the Indigenous tourism industry. Voting members who are export-ready also have the option to invest in an optional marketing upgrade to increase the level of ITAC support provided in marketing to the international marketplace. Due to the COVID-19 pandemic, all membership fees are waived other than for industry partner members. ITAC takes an approach to make membership fees very affordable; all categories are set at $99 per year with an additional $199 for the marketing upgrade.

ITAC has a strategic priority to support establishing new or strengthening existing Indigenous tourism associations across Canada. The 2019-2024 ITAC strategy lists a priority, under the Leadership strategic pillar, to "continue capital investments for Indigenous tourism associations that already exist and provide support for provinces and territories developing new Indigenous tourism associations."[108]

ITAC provides active guidance and support to provinces looking to establish or grow an Indigenous tourism association. Participation by ITAC involves more than funding support but also includes advocacy as well as guidance on best practices to follow to develop an association. In 2017 during Alberta Day of the IITC hosted in Calgary, ITAC presented why they provide support for new Indigenous tourism organizations. ITAC presented that these associations provide regional approach to issues and opportunities, on-the-ground delivery of support not possible by a National assoc., similar approach to Destination Canada and the provincial tourism associations. ITAC also presented the steps or stages they recommend to launch a new Indigenous tourism organization:

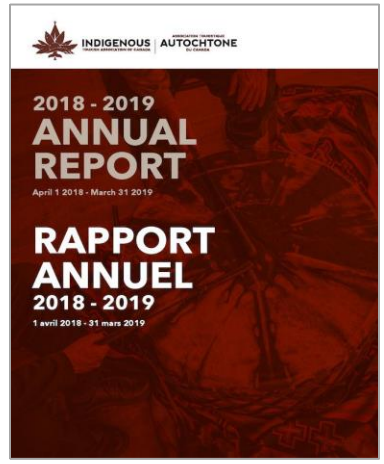
- With support from ITAC, activate regional Indigenous tourism engagement sessions to educate on value of Indigenous tourism and potential for an Indigenous tourism organization for the province
- Identify champions and create advisory/ working group to discuss issues and opportunities.
- Collect and review research – both demand & supply-side – to help inform a strategic plan that reflects the identified key factors from the research
- Advisory group builds strategic plan based on research
- Investigate funding support and partners using research and strategic plan to demonstrate validity
- Establish formal association with leadership formed from advisory group and champions
- With help from ITAC and provincial funders, new association delivers strategy and establishes sustainability[109]

[108] ITAC – Strategic Plan – 2019-2024 - https://indigenoustourism.ca/corporate/wp-content/uploads/2019/03/18-10-Accelerating-Tourism-Growth-Booklet-v7.pdf
[109] ITAC – IITC Website – 2017 Conference webpage - https://indigenoustourismconference.com/past-event/highlights-from-the-2017-iitc/

Organizational Financial Sustainability Approach

In ITAC's most recently shared annual report, the 2018-19 document (for fiscal year ending Mar. 31, 2019) shows that ITAC collected $4.9 million in revenues against $5.3 million in expenses resulting in almost a $400 thousand deficit for the fiscal year.

Based on the financial report, ITAC has several self-earned revenue streams used to offset some of the related expenses. For example, ITAC earned over $218,000 in fees and sponsorship to offset the over $430,000 in expenses for the event. Membership fees bring in over $33,000 however membership support expenses are in excess of $52,000.



Source: ITAC Website

Funding contributions for 2018-19 were $4.44 million with $3.12 million coming from Indigenous Services Canada representing 71% of all contributions. Destination Canada is the next largest contributor (in 2018-19) with $450,000 in funding. The remaining funders are provincial or regional organizations funding specific programs within the province or region through ITAC or are federal organizations like Parks Canada.[110]

ITAC's self-earned revenue streams does not provide a net gain to the organization's bottom-line however they do offset some of the costs of specific programs and activities. ITAC is, like other tourism associations, highly dependent of funding partnerships. ITAC is effective in having several funders for additional programs however the association has a critically important funding relationship with one agency: Indigenous Services Canada.

The key best practices to learn from Canada:

The national Indigenous tourism association has developed and delivered key programs, activities and also expertise specific to helping provinces and regions establish and expand their Indigenous tourism industry:

- ITAC supports a regional approach with its support of provinces and territories to establish or grow their Indigenous tourism association. They also have regional coordinators in several key provinces or areas to provide regional activation and coordination.
- The partnerships developed by ITAC are strategic in that they support their specific key priorities including marketing (Destination Canada), training and capacity development (Tourism HR Canada) and industry advocacy (Tourism Industry Association of Canada).
- ITAC has invested in research as it provides direction, understanding and also for buy-in on the planning that is developed from research. ITAC's research also reports on progress and achievements.
- The membership program has a low cost of entry and has extensive benefits for those at a market-ready or export-ready level, primarily through marketing and access to funding programs.
- ITAC's funding is unfortunately primarily dependent on one partner, however most tourism associations are in this situation and ITAC spends a considerable amount of effort to strive to maintain an effective and mutually beneficial relationship with Indigenous Services Canada.
- ITAC is very active in demonstrating their leadership and advocacy efforts. ITAC representatives travel frequently to industry events and regional meetings to show their involvement and demonstrate their leadership. Several members of staff and the Board sit on other industry Boards and committees.
- The annual IITC event provides capacity development for the event participants but also very importantly provides networking time, demonstration of achievements and strengthening of organizational partnerships.

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[110] ITAC – Annual Report – 2018-19 - https://indigenoustourism.ca/corporate/wp-content/uploads/2019/11/ITAC-Annual-Report-2018-19.pdf

This table summarizes eleven key programs or activities and five measurable results for the five Indigenous tourism organizations reviewed in this section of the study. The table demonstrates that the strongest organizations achieve most of these comparable activities and measurable results. The list of programs and activities also serve as a list of common best practices to consider when developing or strengthening a provincial Indigenous tourism organization.

Indigenous Tourism Association Programs

	Indigenous Tourism BC	Quebec Aboriginal Tourism	Yukon First Nations Culture & Tourism	Indigenous Tourism Ontario	Indigenous Tourism Association of Canada
Programs or Activities					
Online marketing and social media promotion of Indigenous tourism businesses	✔	✔	✔	Some	✔
Regular business development support including training programs	✔	✔	Some		✔
Industry advocacy and promotional activities including travel trade shows and industry conferences	✔	✔	✔	✔	✔
Region-specific programs such as regional coordinators & programs	✔	✔		✔	✔
Established and specific Indigenous community support programs, training and collaboration	✔		✔		
Organizational board leadership representing Indigenous tourism operators.	✔	✔	✔	Some	✔
Active membership program with multiple categories and benefits.	✔	✔	✔	✔	✔
Active in the mainstream community with events and promotions	✔	✔	✔	✔	✔
Wide range and number of active industry partners and partner programs	✔	✔			✔
Financial stability with long-term funding partners	✔	✔			
Have a formal strategic plan, annual business plans and share annual reports	✔	✔	✔	Some	✔
Measurable Results					
Strong membership enrollment as compared to total businesses in the province	✔	✔	✔	✔	✔
Active association for ten or more years	✔	✔	✔		
Minimum 10% growth in number of Indigenous tourism businesses from 2014 to 2017	✔		✔	✔	✔
Minimum 25 Indigenous tourism jobs per 1,000 of total Indigenous population	✔		✔	✔	✔
Indigenous tourism revenues at least 3% of total tourism revenues in the province		✔	✔	✔	✔

Analysis of Trends & Themes

In comparing the above four provinces/territories who have an established Indigenous tourism industry as well as looking at the national Indigenous tourism organization for Canada, there are several themes and trends that are consistent with most or all of these five comparable organizations and their efforts. The following trends and themes provide a list of best practices demonstrated by all or most of the successful organizations in Canada helping to support and grow Indigenous tourism in Canada.

Key Best Practices for Establishing Indigenous Tourism in a Province or Territory

The most successful provinces or territories in Canada have an Indigenous tourism organization helping to sustainably grow the industry with authentic, in-demand experiences and strong marketplace awareness. The majority of these organizations show these consistent best practices:

1. Extensive marketing programs and activities in partnership with destination marketing organizations to a) guide and support Indigenous businesses in their marketing efforts and b) provide direct to consumer and travel trade promotions and awareness on behalf of market and export ready businesses.
2. Strong priority for business/product development to reflect marketplace gaps, consumer demands and ability to offer market-ready experiences to consumers; particular attention is focused on establishing or strengthening market or export readiness for eligible businesses.
3. Close, established relationships with funding partners through a mutually beneficial partnership to build financial stability and sustainability.
4. Active leadership and advocacy for Indigenous tourism to build awareness, respect, opportunity for collaboration, strategic alignment and support.
5. Effective strategic planning process to build and grow an Indigenous tourism organization through engagement, research, funding partnerships and effective organizational governance and operations.
6. Measurable goals and timelines demonstrating specific targets to achieve through the strategic plan and programs.
7. Close partnership with industry organizations with aligned strategies and overlapping mandates.
8. Established and operating membership (or stakeholder) program that maximizes participation through a) low cost of membership, b) relevant, useful benefits and c) active communication and coordination with members on a regular consistent basis.
9. Visible activity in the mainstream tourism and corporate environment through hosting of events, participation on committees and attendance at industry conferences and marketplaces/tradeshows to build awareness and understanding of the organization and identify partnerships and collaborations.
10. Regional approach to business and community support to adapt to regional differences and issues through region-specific programs and regional coordinators.
11. Adaptability to changes in the political or economic environment to allow the organization to survive changes or threats out of the control of the organization; typically this is achieved with a diverse funding and partnership base and the ability to scale the organization based on available funding and support.
12. Successful self-earned revenue streams to help offset project costs or to expand projects (i.e.: events, membership, marketing collateral, direct-to-consumer sales channels) however these revenue streams do not show a net profit to assist with other projects or the overall organizational bottom line.
13. Collaboration with Indigenous community leadership (i.e.: BC and Yukon in particular show specific effort to collaborate); demonstrating understanding that support from community leadership is critical in being able to achieve and sustain success and also to benefit from the existing economic development support programs and administrative systems available to community-owned businesses.

INDUSTRY ENGAGEMENT

THIS SECTION OF THE REPORT REVIEWS THE INDUSTRY OUTREACH AND ENGAGEMENT

Industry Engagement

The Indigenous tourism marketplace analysis has demonstrated that Indigenous tourism in Atlantic Canada has a marketplace opportunity however there needs to be a better understanding of a) the barriers that Indigenous tourism experiences in the region, b) the supports needed to work towards overcoming those barriers from the perspective of the businesses and suppliers/operators themselves and c) the supports available from the tourism industry and Indigenous support organizations.

This section of the report reviews the industry outreach and engagement efforts completed for this report and summarizes the collected data research results through graphs, charts, tables, and analysis.

Engagement Objectives and Goals

Overall, the Industry engagement objective for this project is to identify potential gaps that exist between business support needs and support organization offerings. From the engagement results, priority efforts and adjustments to current efforts can be recommended.

In this project there are two primary groups for targeted engagement. Each group has specific goals to achieve within the engagement process.

3. SUPPLIERS

This included Indigenous entrepreneurs, business operators, tourism experience suppliers and business managers. This group also included Indigenous community representatives involved with community economic development and community capacity development.

- Goal – to understand the priority needs, unmet needs, opportunities & challenges, identification of trends and themes and new challenges due to COVID-19

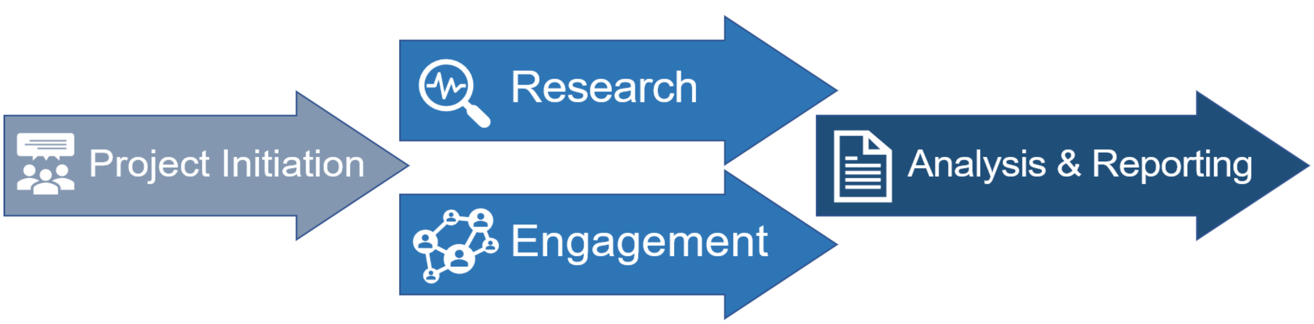
4. SUPPORTERS

This included Provincial and Federal representatives operating in economic development policy and programming related to Indigenous and non-Indigenous tourism and economic development. This group also included Indigenous and non-Indigenous national, provincial, and regional tourism associations and industry representative organizations active in Atlantic Canada.

- Goal – to understand the organizational goals, relevant programs, their perception of Indigenous tourism opportunities & challenges, new upcoming activities, identify trends and themes and new programs due to COVID-19

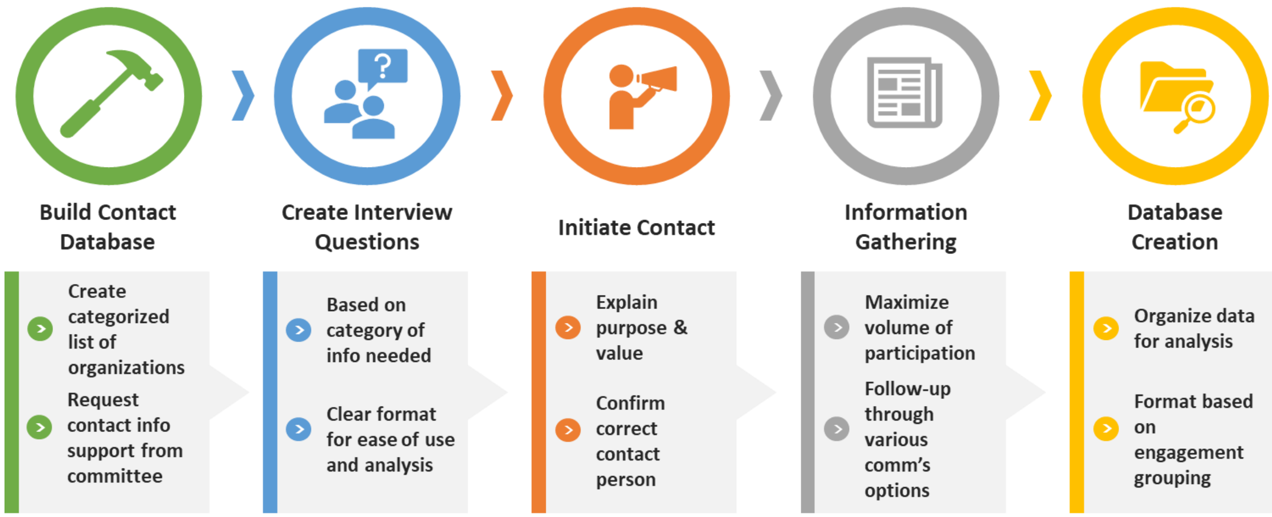
Engagement Approach

In direct consultation with Joint Economic Development Initiative (JEDI), the project lead organization, and from the industry expertise, advice and guidance of the project steering committee, this study's approach involves four key elements:



The approach depicted above demonstrates that research and engagement are both utilized to inform the analysis and reporting provided by the overall study. The industry research presented earlier in this report were completed prior to activating the engagement; the engagement activation will assist in informing the 'supports versus needs' gap analysis and the final study recommendations for supporting growth of the Indigenous tourism sector in the Atlantic provinces.

The approach of this portion of the project is depicted below as a five-step process to collect and organize the collection of relevant and useful data and information:



The data has been collected and organized to allow this report to summarize the data to identify themes and trends relevant to the overall objective of the project.

<u>Engagement Phases and Activities</u>

Engagement was completed through a series of specific phases each of which included an identified purpose of the phase and activities within each phase.

- Design & launch the project surveys

  Timing: Design – May 4 to 18, Survey Launch – May 19/20
  - Purpose: To collect feedback, priorities and understanding of opportunities and challenges from key stakeholders to determine trends and themes in the data collected. Collection divided into two categories: 1) Indigenous tourism support organizations and 2) Indigenous tourism suppliers and Indigenous community leadership
  - Survey launched May 19, 2020 and sent via Campaign Monitor to 206 emails from the stakeholder databased collected for this project.
- Project Steering Committee one-on-one interviews

  Timing: May 19 to June 19/20
  - Purpose: To discuss the overall project in a one-on-one setting (by phone) and collect feedback, priorities and understanding of opportunities and challenges from all 24 committee members
  - 22 one-on-one phone interviews were completed with the project committee members which included survey responses submitted to the survey database.
- Expand key stakeholder database for outreach

  Timing: May 4 to June 26/20
  - Purpose: To continue to expand contact information and email list of key stakeholders to include in engagement outreach for the study.

    - Steering Committee members representing Indigenous tourism associations operating in Atlantic Canada, on behalf of their organizations, assisted in supporting this project with an updated inventory list of Indigenous tourism businesses located in the region.
- Encourage committee assistance to support survey participation

  Timing: June 6 to 19/20
    - Purpose: Communicate with each of the members of the Project Steering Committee to request that they use their existing communications channels (email newsletters, social media and informal communications) in order to increase awareness of, and participation in, the project survey. Consultants produced key messaging to be used by the committee members as well as a PDF information sheet with active links to the survey to be attached to emails.
    - Multiple members of the project steering committee confirmed their support in sending out the survey information within their regular newsletter emails and through their social media channels.
- Continuous follow up with stakeholder database until close of survey

  Timing: June 6 to 26/20
    - Purpose: To increase participation in the survey by contacting the stakeholder database by email and phone as well as research additional stakeholder contact information to expand the outreach audience
    - Including the initial survey launch, the survey was emailed out to the email database a total of four times over the five and a half weeks that the survey was open or 'live'.
    - By the end of the survey, the survey database expanded to 424 unique contacts
    - At the close of the survey, 81 unique responses were collected
- Engagement Phase Review Committee Meeting –

  Timing: July 9/20
    - Purpose: To update the Project Steering Committee on progress with outreach and engagement, provide a preliminary overview of the survey data collected for discussion and to collect feedback and comments from the committee
    - Feedback was collected from the committee meeting discussion to be included in the report

Analysis of Survey Results

This section of the project report will summarize the data collected to provide an understanding of a) who are the respondents and their key characteristics and b) what are their viewpoints and opinions on priority issues within Indigenous tourism in Atlantic Canada.

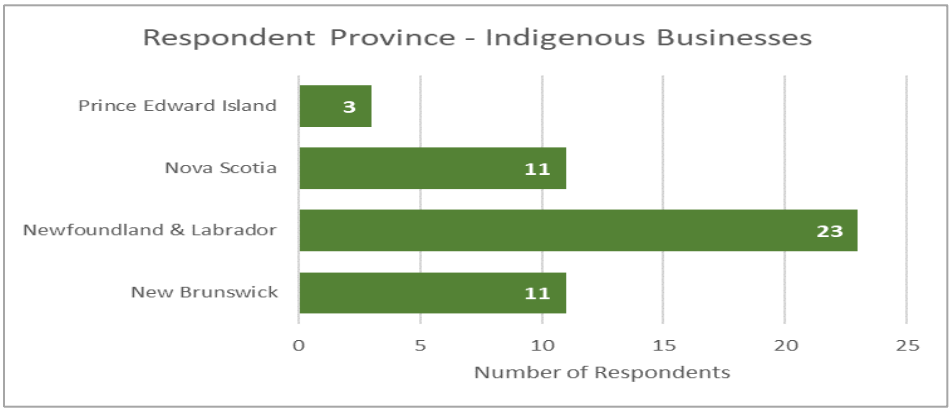
The database of contacts totalled 424 with the assistance of several Indigenous tourism associations assisting in expanding the reach of the survey, in particular to Indigenous tourism operators or 'suppliers'. In total there were 81 survey responses which calculates to a 19% overall response rate.

The reporting of survey results is divided into two sections: 1) Indigenous Tourism Operators & Indigenous Community Leadership (referred to in this report as "Suppliers") and 2) Indigenous Tourism Supporting Organizations (referred to in this report as "Supporters").

<u>Indigenous Tourism Operators or Indigenous Community Leadership - Suppliers</u>

This group provided 48 of the 81 overall responses representing slightly under 60% of all responses.

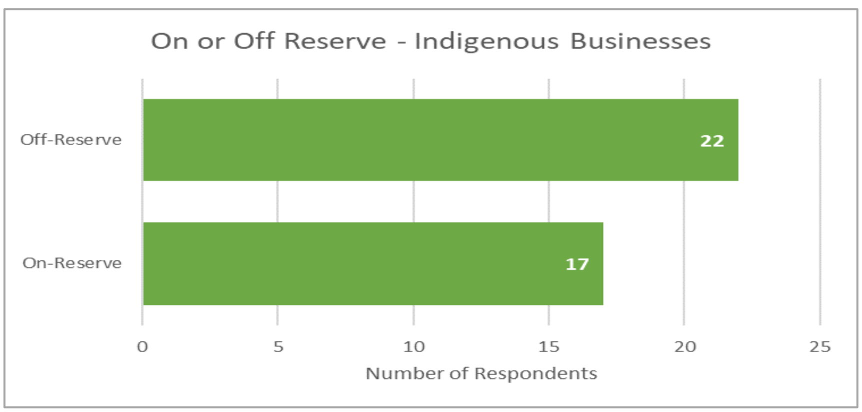
Province or Region	**# of responses**	**% of total responses** (from Supplier Businesses)
New Brunswick	11	23%
Newfoundland & Labrador	23	48%
Nova Scotia	11	23%
Prince Edward Island	3	6%



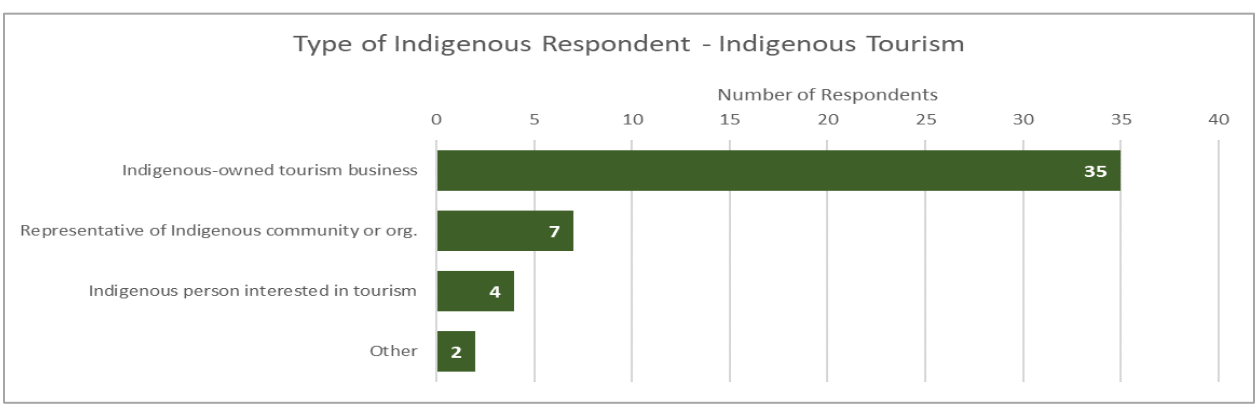
The table and chart above show a strong number of responses from Newfoundland & Labrador with 48% of all supplier responses originating from this province. Although there was assistance in promoting the survey in Prince Edward Island from project steering committee members, this province submitted just three responses or 6% of the total supplier responses.

The following two bar graphs show the breakdown of Supplier responses relating to a) if they operate on or off reserve and b) if the respondent is associated with an Indigenous tourism business or if they represent an Indigenous community rather than a specific business.

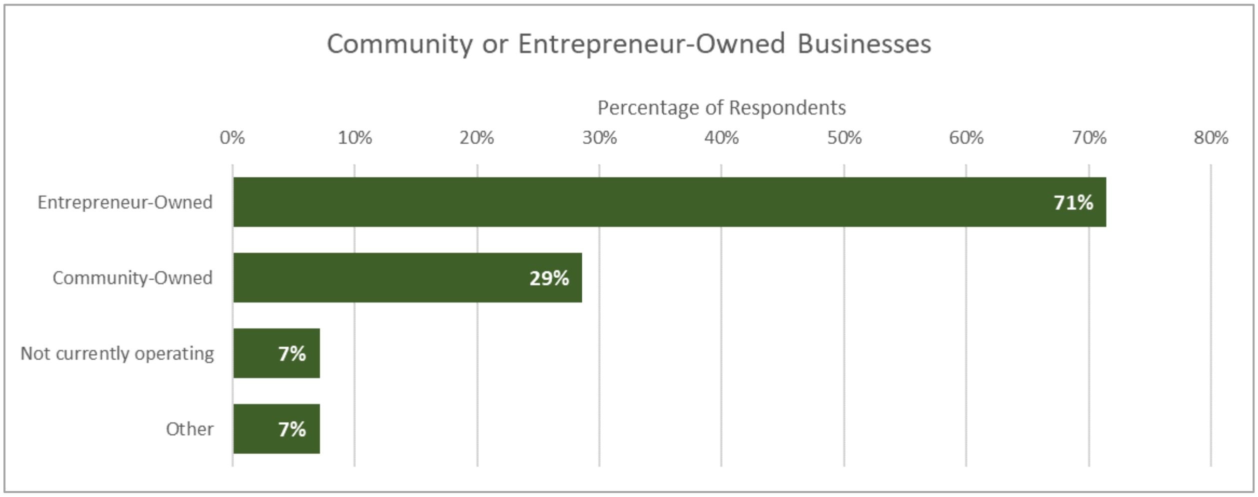
We can see that slightly over half (56%) of the Supplier respondents who responded operate their business off-reserve as compared to 44% who are on-reserve.



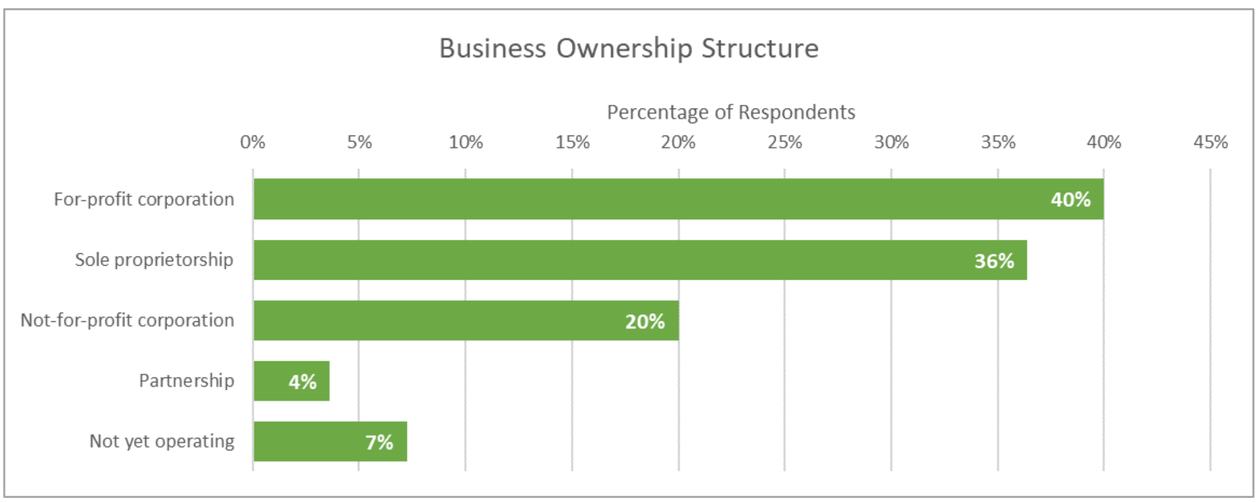
The next bar chart shows that a significant majority (73%) of Supplier respondents who answered this question represent an Indigenous-owned business as compared to 27% who represent an Indigenous community or Indigenous person interested in tourism.



The next bar chart shows that 71% of the supplier respondents represent entrepreneur-owned businesses as compared to 29% who represent community-owned tourism businesses with 14% of responses in the 'Other' category or not yet actively operating a business.



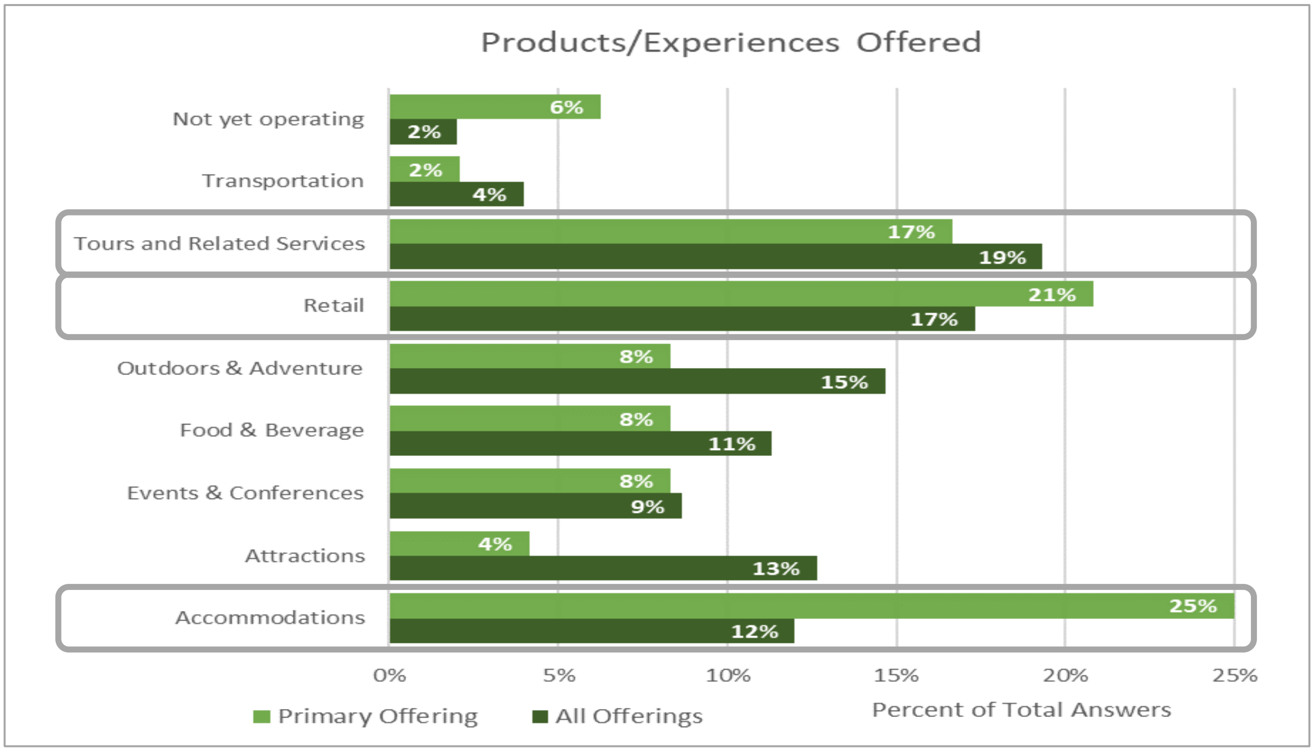
Relating to business ownership structure, the next bar chart shows that 80% of the respondents represent for-profit businesses with 40% running a for-profit corporation and 36% running a sole proprietorship with 4% having a partnership ownership structure. The remaining 20% of supplier respondents are established as not-for-profit corporations with 7% not yet operating a business.



The supplier survey also asked the respondents to share the types of tourism products offered by their business. In the next bar chart:

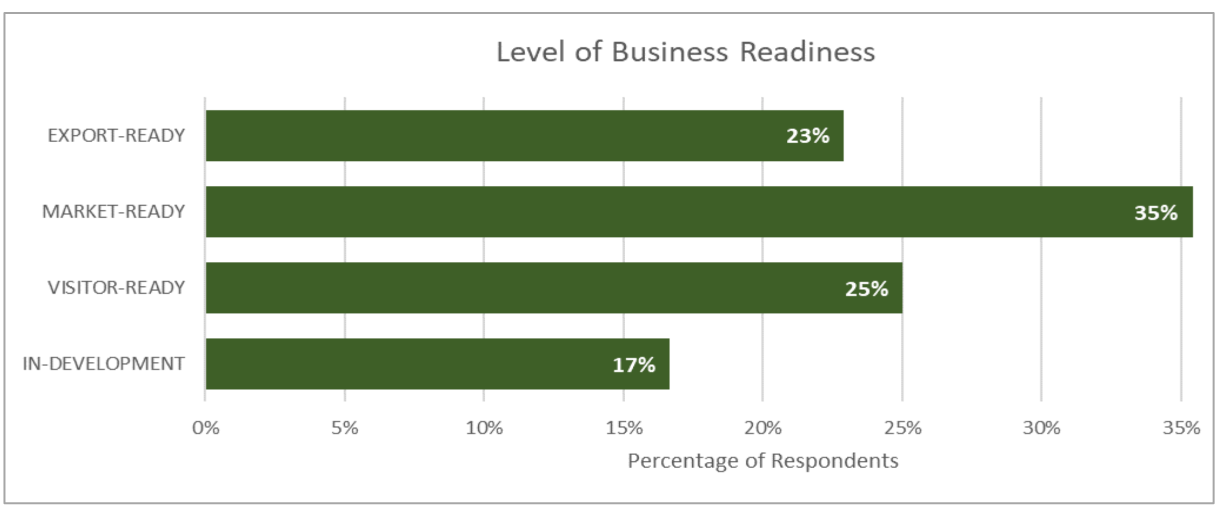
- Dark green represents all tourism product or service options offered by the respondents
- Light green represents their primary offering for their business showing what is the most important product or service they offer based on gross revenues earned.

The majority of respondents primarily offer accommodations (25%), retail (21%) or tours and related services (17%). Many of the respondents also offer outdoor & adventure experiences, an attraction (like a cultural display or physical infrastructure) and food & beverage. Attractions, however, are rarely the primary product or experience offered by the respondents at just 4%.

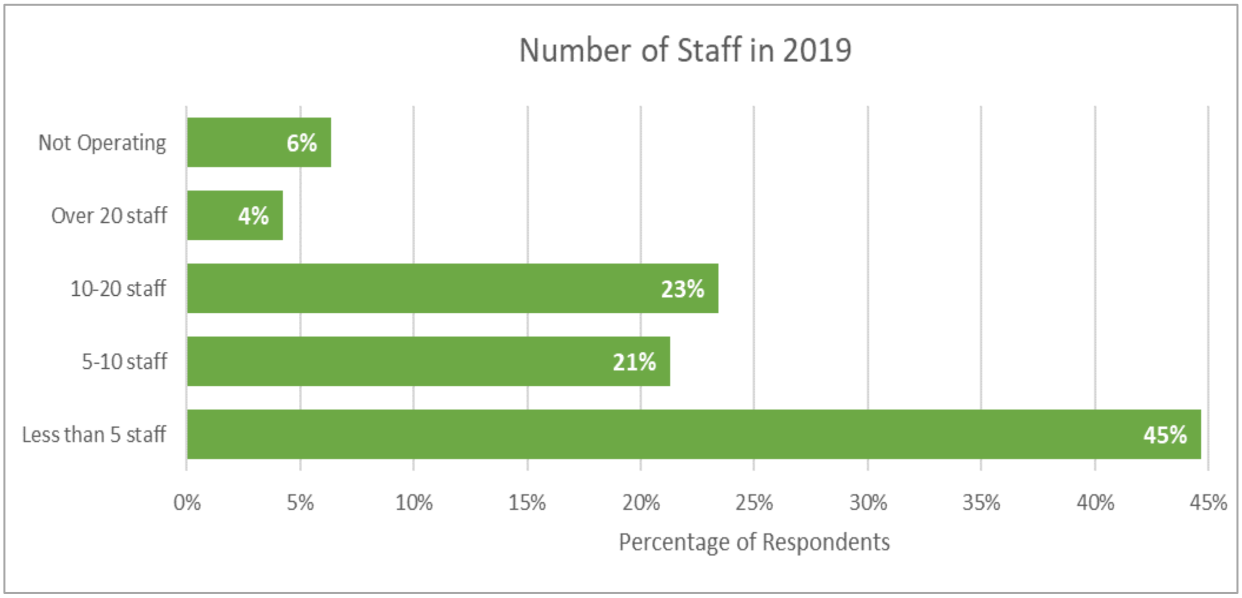


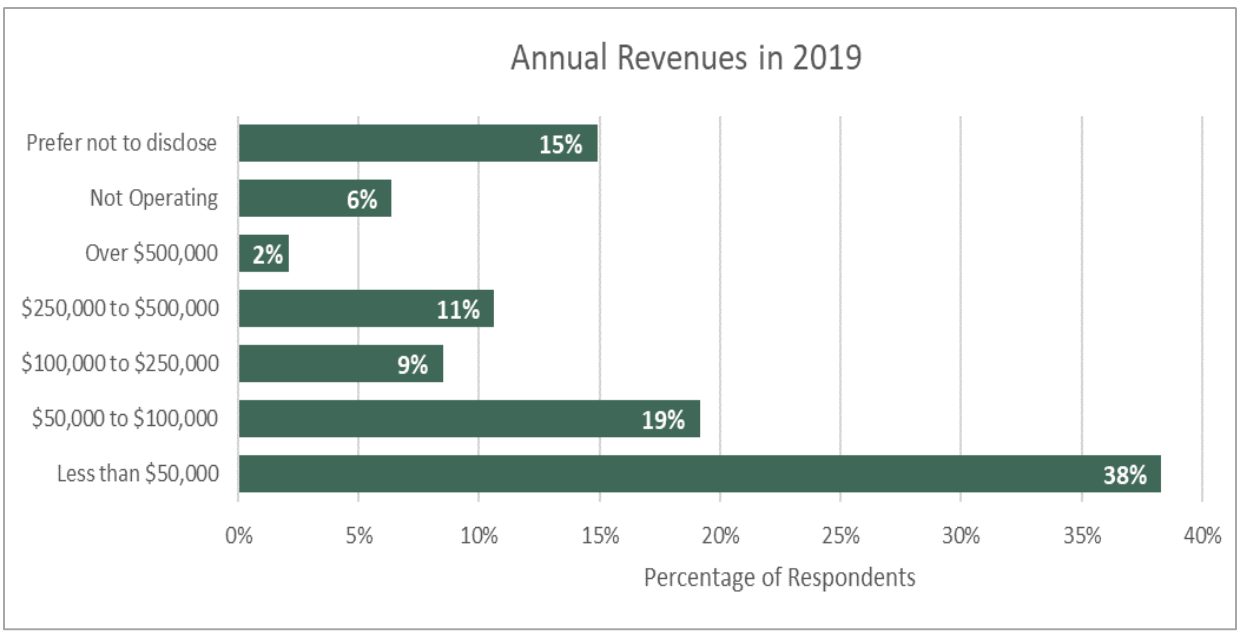
Supplier respondents were asked to self-assess their level of business readiness based on tourism industry standards which were described in detail in the survey to assist the respondents in determining their own level of business readiness. For example, 'in-development' refers to a business that is still in the concept stages or may be operating but without the necessary licenses, certifications or permits. At the other end of the scale, 'export-ready' would be a business that has been active for at least one year, has liability insurance (typically $2 million), understands the travel trade system including receptive tour operators, travel wholesalers, retail and online travel agents etc., has pricing levels established for retail, agent commissions and wholesale net rates, and has set minimums and cancellation policies for travel trade partners.

The majority of respondents shown in the chart below are at market-ready (35%) or visitor-ready (25%) with 23% of respondents at export-ready. This suggests that the respondents generally are experienced in tourism based on their level of readiness.

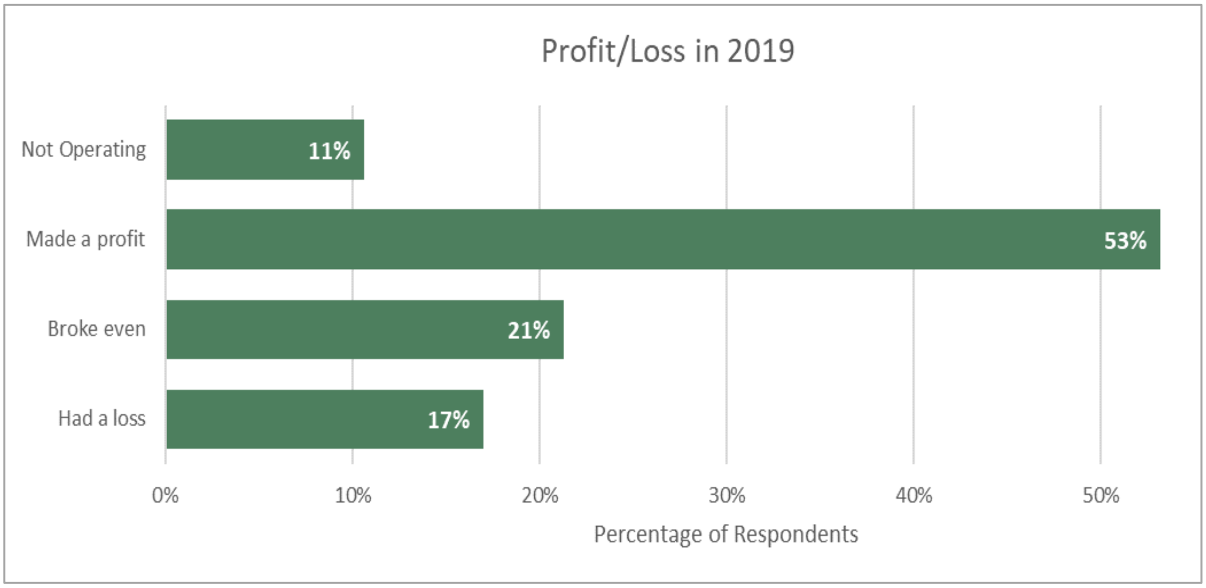


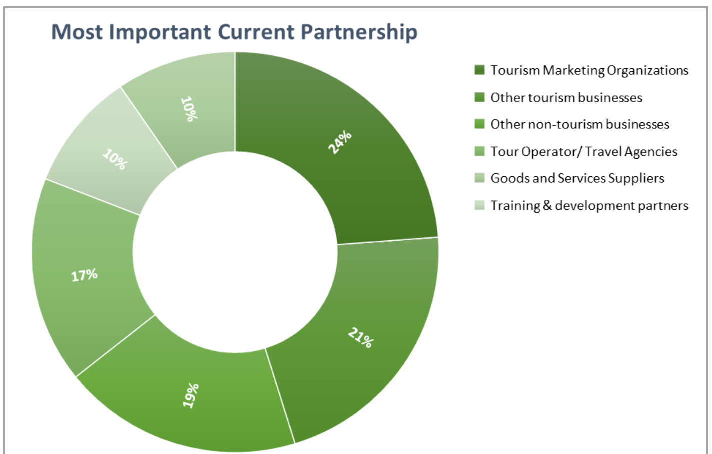
The next two bar charts help to show the size of the business based on number of staff and gross annual revenues. A significant percentage of the supplier respondents (45%) have less than 5 staff and 57% of respondents earn less than $100,000 in annual revenues including 38% with less than $50,000. This confirms that the majority of respondents are small enterprises.

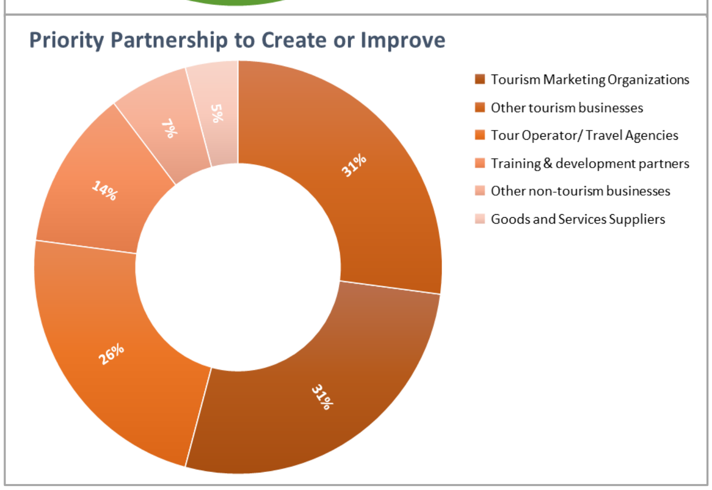




On a very positive note, the next chart indicates that 53% of supplier respondents earned a net profit in 2019 through their tourism businesses with just 17% of respondents reporting a net loss. This is encouraging as it indicates that although total revenues may not be significantly high amongst the survey respondents, the businesses are earning a profit.







The supplier respondents were asked two questions regarding their partnerships:

1. Their most important current partnership
2. The type of partnership that is a priority to them to create or improve.

The circle charts to the left show the results of the supplier responses. In terms of their most important current partnership, the respondents indicated that their top three are:

- Tourism marketing organizations – 24%
- Other tourism businesses (B2B) – 21%
- Other non-tourism businesses (B2B) – 19%

Relating to their priority partnerships they wish to create or improve, the respondents indicated that the top three are:

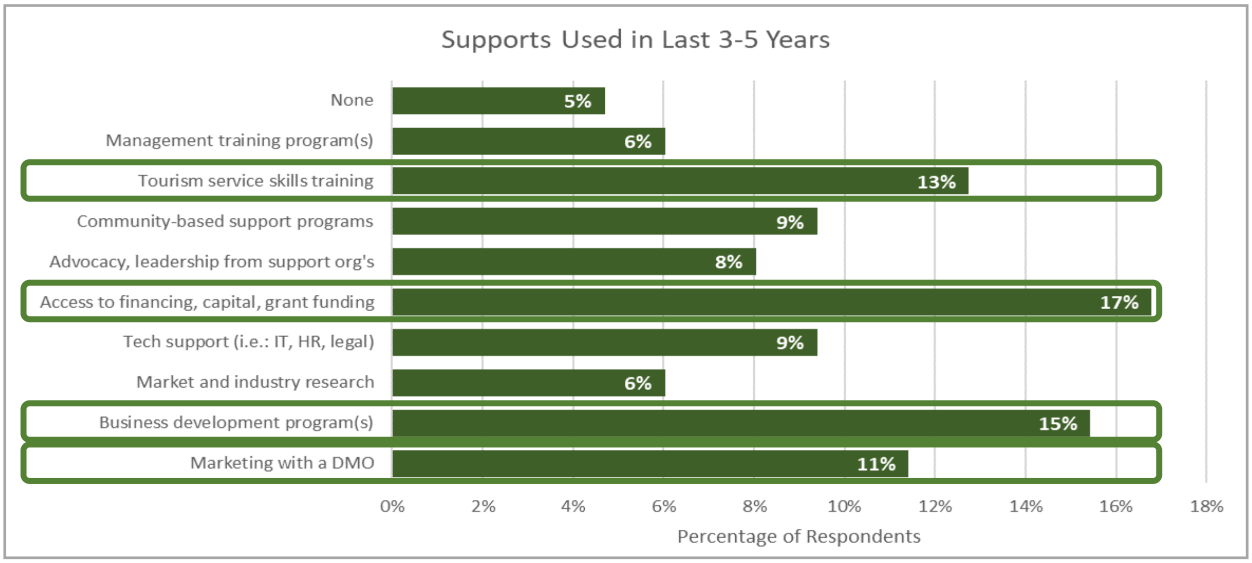
- Tourism marketing organizations – 31%
- Other tourism businesses (B2B) – 31%
- Tour operators/travel agencies – 26%

When comparing the two sets of responses we can see that the businesses tend to highly rate their partnerships with tourism marketing organizations and other tourism businesses as these are listed in the top three in both current partnerships and partnerships to grow or create. It is also important to identify that tour operators and travel agencies are the third highest priority to create or improve for suppliers and should be reflected in the recommendations.

The bar chart below shows the types of supports the supplier respondents had used or accessed in the last three to five years. The top four types of supports used (in order) are:

- Access to financing, capital, grant funding – 17%
- Business development programs – 15%
- Tourism service skills training – 13%
- Marketing with a DMO – 11%

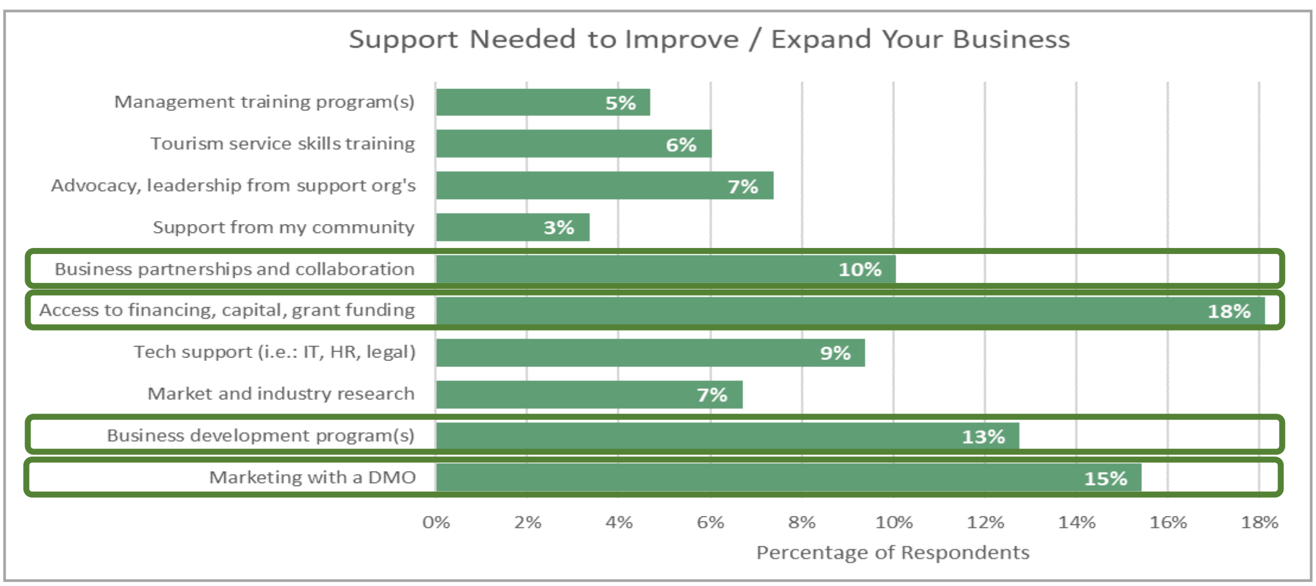
Just 5% of respondents indicated that they had used no support opportunities in the last three to five years and that management training and industry research was accessed by only 6% of the respondents.



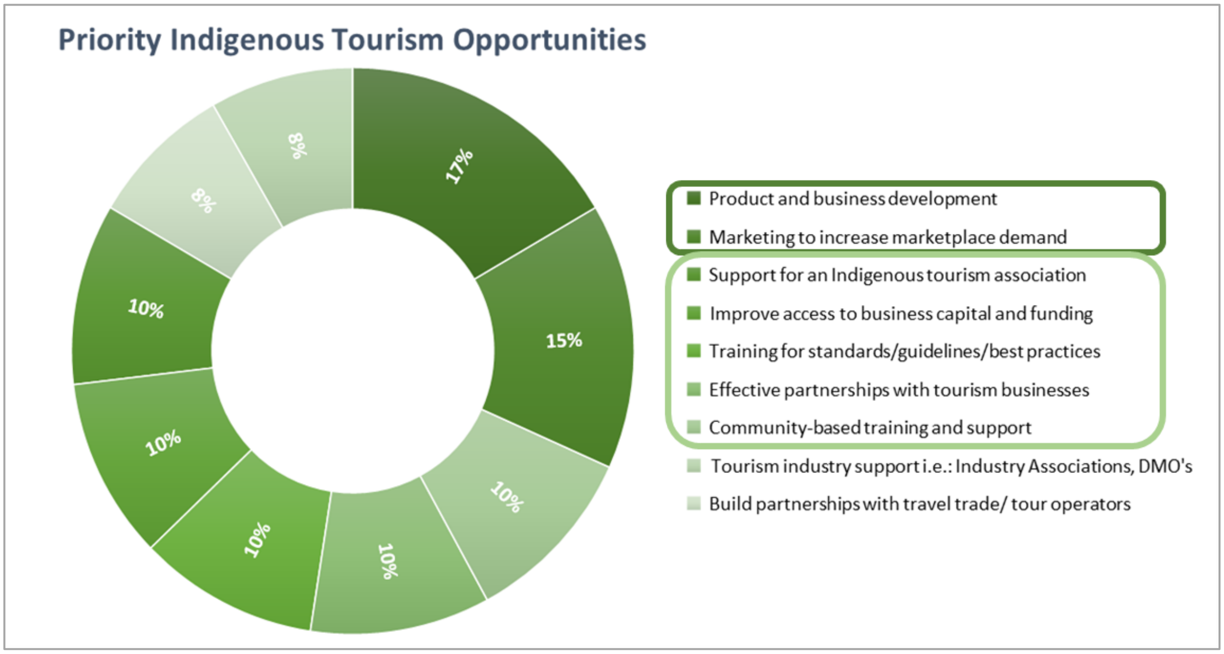
This next bar chart depicts the priority supports needed for suppliers to improve or expand their business. The top four priority supports needed by suppliers are:

- Access to financing, capital, grant funding – 18%
- Marketing with a DMO – 15%
- Business development programs – 13%
- Business partnerships and collaboration – 10%

Interestingly, access to financing is the top support being accessed and is also the top support needed.



The circle chart below represents the supplier responses regarding their perception of the priority opportunities for Indigenous tourism in Atlantic Canada. The top response with 17% of the responses is "product and business development" with "marketing to increase marketplace demand" a close second at 15%. These two themes are very business-focused typically leading directly to increased business volume for the businesses. The rest of the options are more indirect opportunities for businesses. Five opportunities all came in at 10% suggesting a wide range of opinions regarding where the priority opportunities exist with no single category getting more than 17% of the responses.

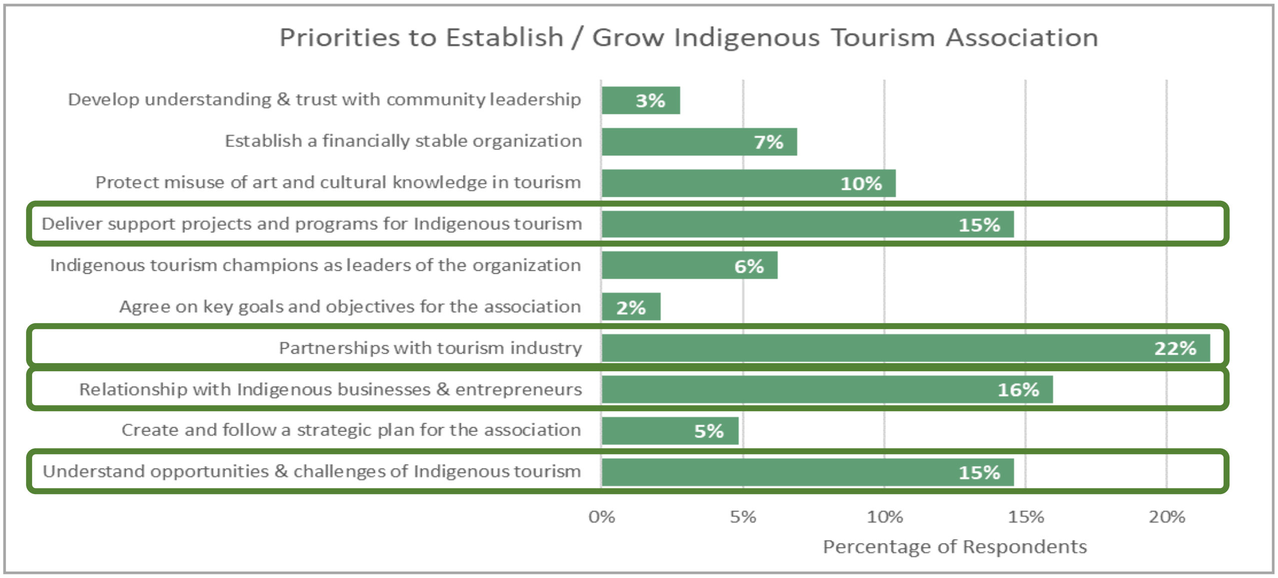


The following circle chart depicts the priority challenges for Indigenous tourism in Atlantic Canada as perceived by the supplier respondents. The top two challenges are "limited partner support (funding, relationships, advocacy)" at 18% and at 15% "Low number of market/export-ready Indigenous tourism

product". The third highest challenge at 12% also relates to the business readiness of the businesses. Similar to the opportunities chart above, the challenges chart shows a wide dispersal of responses.

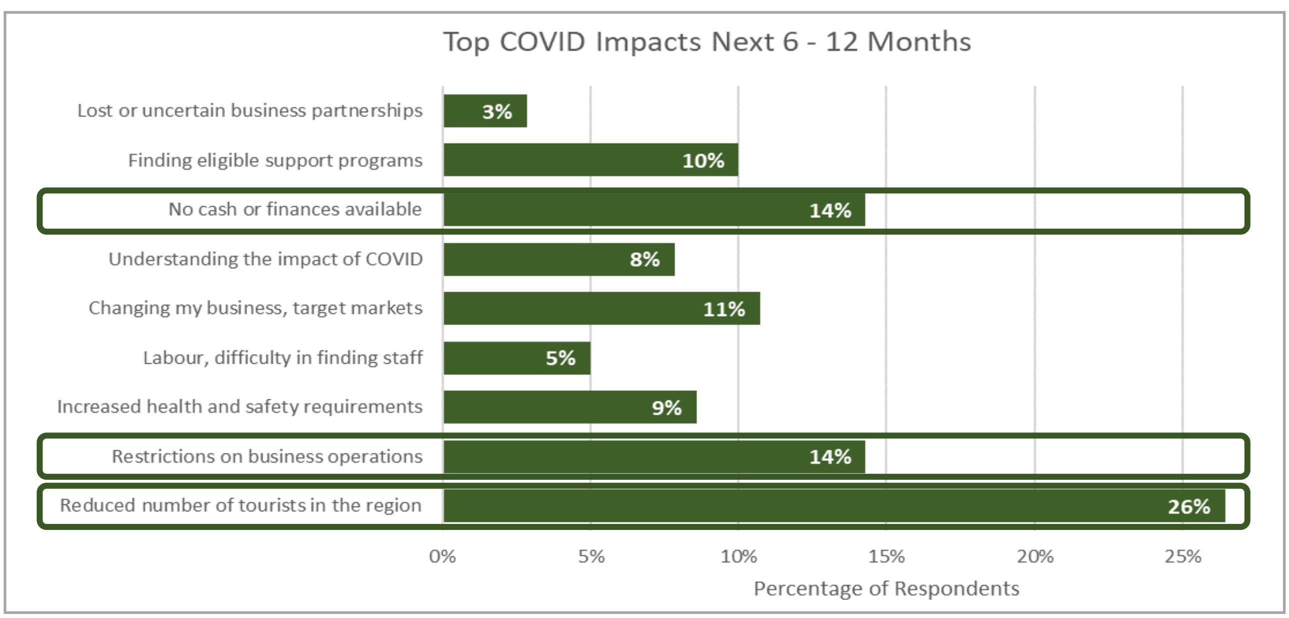
This next bar chart shows the opinion of the supplier respondents regarding priorities to help create or grow an Indigenous tourism association in their province. All four of the Atlantic provinces have new Indigenous tourism associations that have started up in the past two years. The top four priorities:

- Partnership with the tourism industry – 22%
- Relationship with Indigenous businesses and entrepreneurs – 16%
- Understand opportunities and challenges of Indigenous tourism – 15%
- Deliver support projects and programs for Indigenous tourism – 15%



The suppliers also shared their expectations of the top COVID-19 impacts on their business in the next six to twelve months. The top impact is, as expected, a reduced number of tourists in the region. The top three impacts expected are:

- Reduced number of tourists in the region – 22%
- Restrictions on business operations – 16%
- Lack of cash flow or finances available to operate – 15%



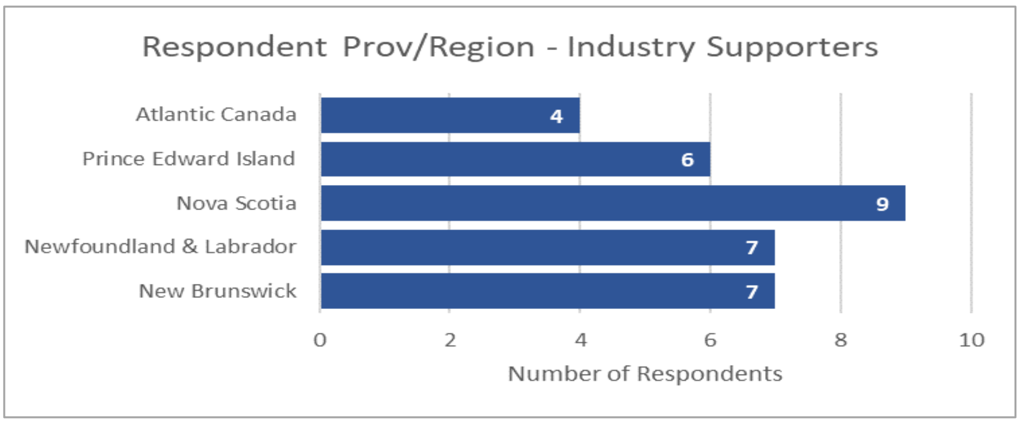
The word cloud depicted below is produced based on word-use frequency in open text responses from suppliers when asked to provide their opinion on the top priority to grow and strengthen Indigenous tourism in Atlantic Canada. The table immediately to the right of the cloud shows the specific word-use frequency with "funding" and "support" both used eight times in 48 responses.

Although "funding" and "support" is used eight times each, they are each used by only 17% of the respondents. This suggests that there is not an overwhelming number of consistent priority issues amongst all the suppliers with "marketing" and "training" also being frequently found in the responses suggesting a broad number of priorities should be considered based on these responses.

Indigenous Tourism Supporting Organizations

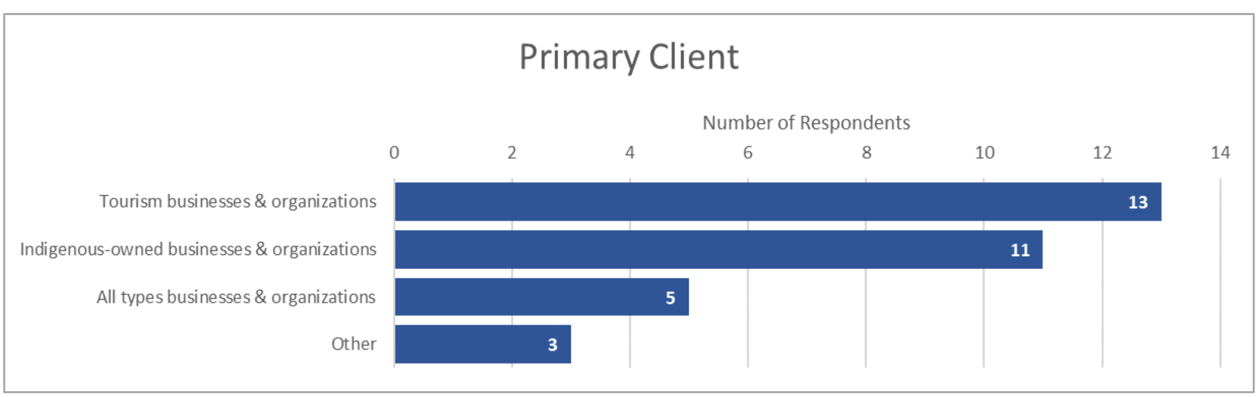
This group provided 33 of the 81 overall responses representing slightly over 40% of all responses.

Province or Region	# of responses	% of total responses (from Support Organizations)
New Brunswick	7	21%
Newfoundland & Labrador	7	21%
Nova Scotia	9	27%
Prince Edward Island	6	18%
Atlantic Canada*	4	12%
*These responses received from organizations who represent the region rather than one province.		



The table and chart above show a strong number of responses to the survey on behalf of a supporting organization from Nova Scotia with balanced number of responses from the other three Atlantic provinces as well. Four of the responses are from organizations that represent the Atlantic region (i.e. Atlantic Canada Opportunities Agency and the Atlantic regional office of Indigenous Services Canada) and are therefore not categorized within any one of the provinces.

The bar chart below shows the breakdown of types of support organizations that responded to the survey based on the type of primary client they support. Twenty-four of the 32 respondents to this question (or 75%) are either supporting as their primary client "tourism businesses & organizations" at 41% or "Indigenous-owned businesses & organizations" at 34% of responses. Supporting organizations who responded also include those who primarily support all types of businesses & organizations at 16% of responses.



The support providers who responded to this survey were asked two questions about types of support. The survey asked what types of support they offered and also asked what types of support were most important to be offered to Indigenous tourism suppliers/operators. The chart below shows a summary of the responses to both of those questions.

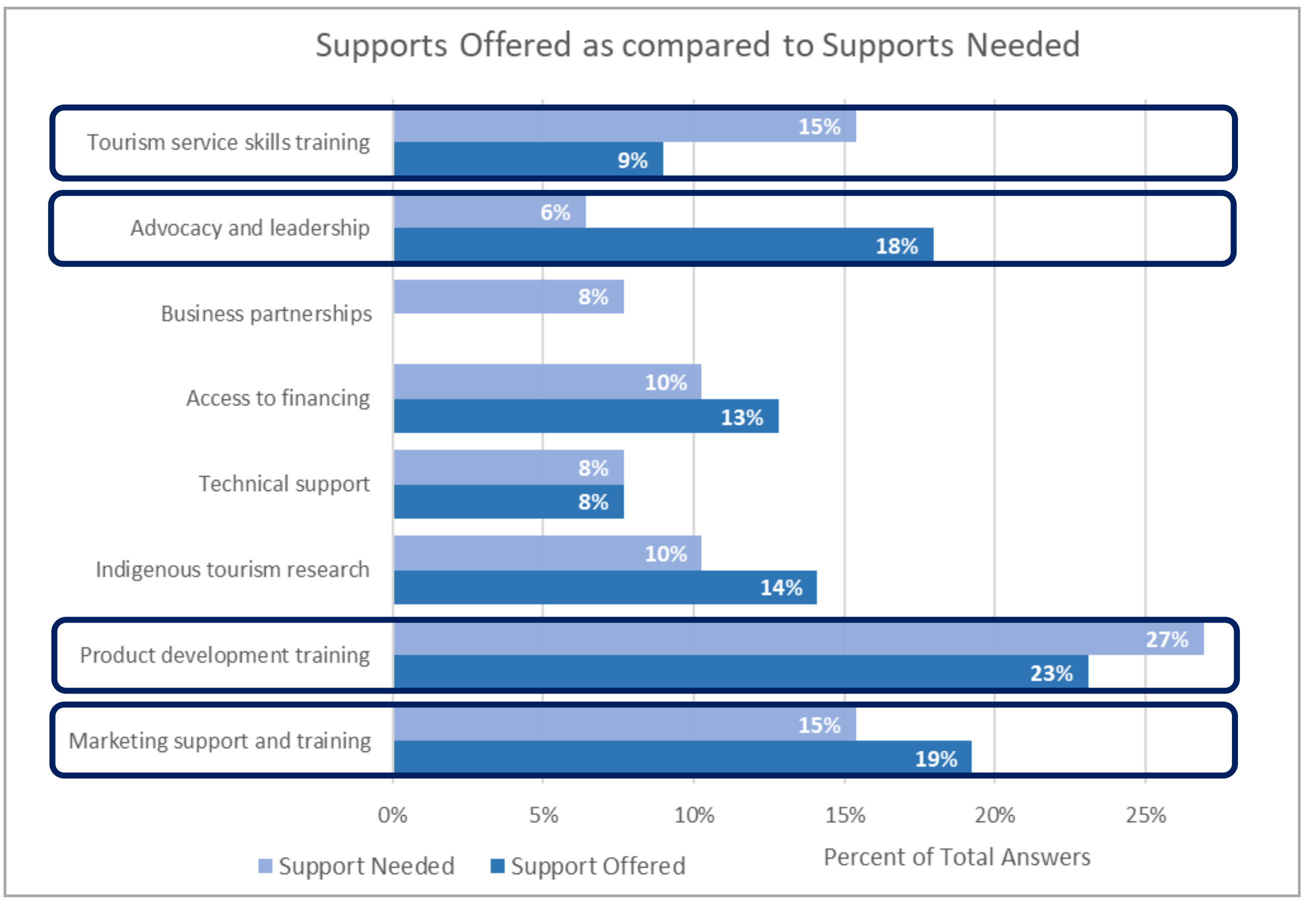
The bar chart shows that "product development training" was the most frequently offered type of support offered by the supporting organizations who responded and is also the category receiving the most responses from supporting organizations in terms of their perception of types of support needed.

Similarly, "marketing support and training" was the second-most frequently offered type of support offered and is also the category receiving the second-most responses from supporting organizations in terms of types of support needed.

It is also helpful to look at categories where there is a larger discrepancy between support offered and support needed. For example, "advocacy and leadership" is the third most frequently offered form of support however the supporting agencies indicated that it was the least frequently listed as a key support needed as compared to the other options.

"Tourism service skills and training" also has a large discrepancy however in this case it has a high level of perceived support need as compared to a relatively low level of this type of support being offered.

And finally, "business partnerships" was listed as a priority support needed by 8% of the support organizations however none of the respondents indicated they offered this type of support indicating a potential gap in service as compared to perceived need.

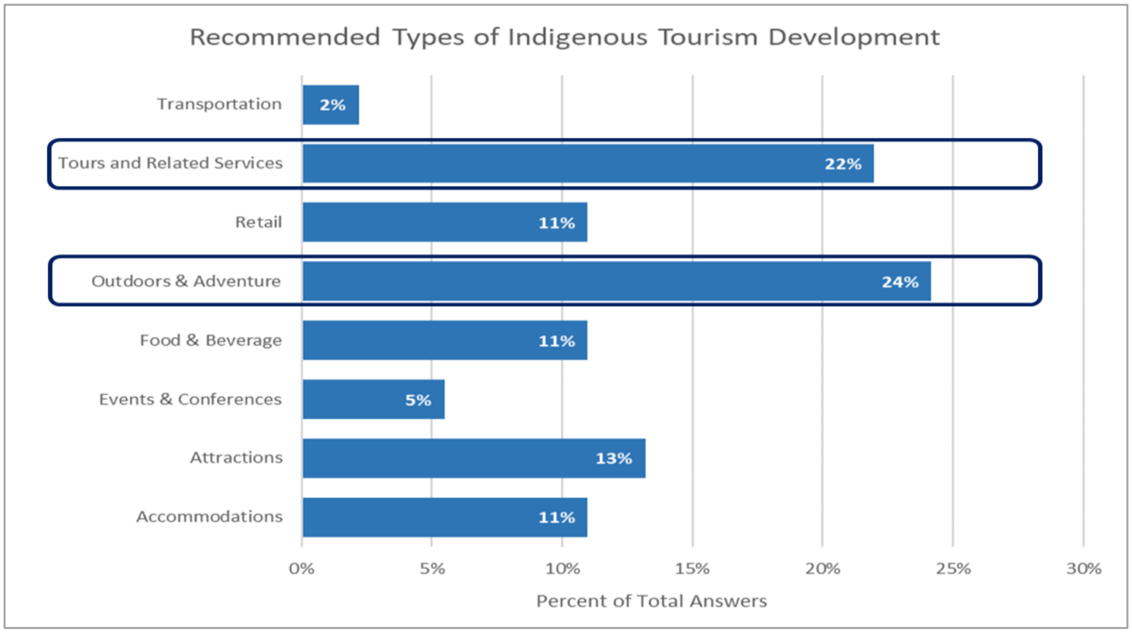


The circle chart below represents the supporting organizations' responses regarding their perception of the priority opportunities for Indigenous tourism in Atlantic Canada. The top response with 30% of the responses is "product development" with "marketing" the second most frequent response at 14%. This suggests a perception from the supporting organizations that product development is needed to alleviate the challenge of limited available experiences for consumers, and is a significant opportunity as compared to the rest of the listed opportunities. The next two highest priority opportunities are "industry support" at 12% and "support for Indigenous tourism associations" also at 12%.

The following circle chart depicts the priority challenges for Indigenous tourism in Atlantic Canada as perceived by the supporting organizations' respondents. The top two challenges are "low number of market/export-ready product" at 20% and at 16% operators "struggling with market/export readiness". The third highest challenge at 12% is "lack of community support" as perceived by supporting organizations. It is important to note that the highest priority challenge identified below matches the highest priority opportunity identified above.

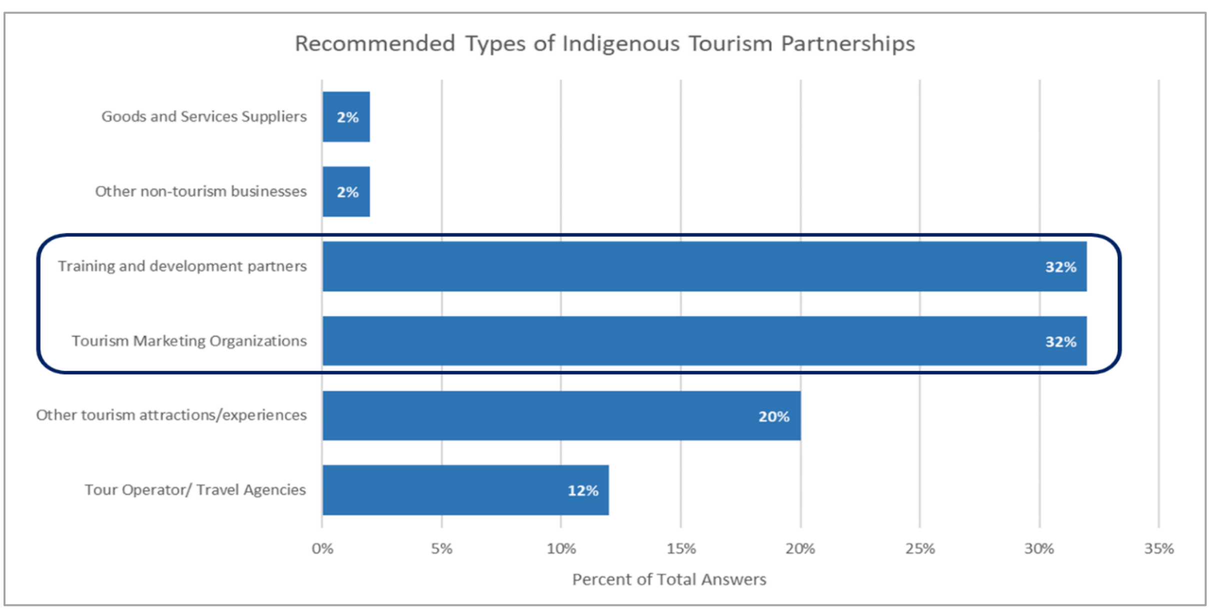
The opportunities and challenges represented in the previous circle charts both point to the need for product development. Anticipating this to be a key priority, the supporting organizations were asked in the survey to recommend the top types of Indigenous tourism development based on their understanding of market demand and the various ways of offering indigenous tourism within the product categories of the tourism industry.

The bar chart below shows that 24% of the supporting organizations who responded recommend "outdoors and adventure" as the top tourism industry category for future Indigenous tourism development in the region. The second-most frequently recommended development category is "tours and related services" which includes cultural sharing workshops, tour operators, and travel agencies.



This next bar chart asks supporting organizations their top recommended types of partnerships for Indigenous tourism businesses. The top two (tied) priority partnerships recommended for suppliers are:

- Tourism marketing organizations – 32%
- Training and development partners – 32%



The word cloud depicted below is produced based on word-use frequency in responses from supporting organizations when asked to provide their opinion on the top priority to help Indigenous tourism businesses recover from COVID-19 challenges. The table immediately to the right of the cloud shows the specific word-use frequency with “funding” and “safety” both used eight times in 32 responses. Development, safety material, communications and various types of direct support are also listed.

This word cloud shows two themes:

1. Direct to business support in the form of funding, communications and development. Development would reflect the need to develop new or adjusted business plans in order to recreate a sustainable business model.
2. Health and safety
   This category includes the need for safety training, understanding the regulations, rules and phases as well as the need for PPE and understanding risk

The word cloud depicted below is produced based on word-use frequency in responses from supporting organizations when asked to provide their opinion on the top priority to help Indigenous tourism grow in the Atlantic region. The table immediately to the right of the cloud shows the specific word-use frequency with "development" used ten times in 32 responses. "Tourism" and "business" were each used 6 times with "access" and "support" each used five times.
This word cloud also shows two themes:

1. Business development
   Development, in terms of the responses collected, includes product development, marketing, partnership, cultural sharing (and respect), awareness and access
2. Business support
   Support, in terms of the responses collected from this question, would include training, capacity development, funding and networking

These two themes are important when comparing to the diverse questions asked in the supporting organizations survey with development and support being a recurring theme throughout the responses and show that these two components are a key priority moving forward for Indigenous tourism in Atlantic Canada.

GAP ANALYSIS

THIS PART OF THE REPORT IDENTIFIES GAPS THAT EXIST WITHIN THE INDIGENOUS TOURISM INDUSTRY IN ATLANTIC CANADA

Gap Analysis

With the market demand opportunity identified in the Indigenous tourism market analysis portion of this report, it is critical to identify how best to seize the opportunity and identify steps forward to grow Indigenous tourism in Atlantic Canada.

A key step in identifying steps forward is to first understand the gaps that exist. A gap analysis will provide insight into areas requiring focus and attention to 'fill in' those gaps or key missing elements. Those key missing elements will then be the focus for the recommended action items of this report.

Gap Analysis Objectives

Overall, the objective of a gap analysis for this report is to identify gaps that exist within the Indigenous tourism industry in Atlantic Canada when comparing the market opportunity and supplier support needs to the current product availability in the marketplace and the current economic development programming and funding in Atlantic Canada available to First Nations and Inuit-led Indigenous tourism initiatives.

Simplified, this gap analysis will compare the following:

Market Demand Opportunity	⇄	**Product Available**
Suppliers' Needs	⇄	**Support Available**

Industry Situation Analysis

<u>Market Demand Opportunity</u>

From the Tourism Market Analysis section of this report, it is demonstrated that tourism is a key industry and of strategic importance for Canada's Atlantic region. Tourism is estimated to contribute more than $5 billion annually to the Atlantic Canadian economy. In Atlantic Canada and prior to the COVID-19 pandemic, tourism supported 9,800 regional businesses, employed 62,900 Atlantic Canadians and contributed nearly $5 billion annually to Atlantic Canada's Gross Domestic Product (GDP).[111]

In 2018, the Indigenous Tourism Association of Canada (ITAC) partnered with The Conference Board of Canada to conduct research into the current state of the Indigenous tourism industry in Canada. The research found that the Indigenous tourism sector, which represents tourism offerings in Atlantic Canada which are owned or controlled by the Indigenous people in Atlantic Canada, is growing at a rapid rate, outpacing Canadian tourism activity overall. The direct economic benefits (GDP) attributed to the Indigenous tourism sector in Canada rose 23.2% between 2014 and 2017, going from $1.4 billion to $1.7 billion. Compared with a 12.0% increase in overall tourism activity in Canada, this shows significant growth of the Indigenous tourism sector across the country in the past five years.[112]

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[111] Atlantic Canada Agreement on Tourism - https://acat-etra.ca/

[112] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018 - https://indigenoustourism.ca/corporate/conference-board-of-canada-research/

Indigenous tourism is diverse and made up of many different business models. While the main drivers of employment and GDP contributions come from air transportation and resort casinos, it is the cultural workers, such as Elders and knowledge keepers, who define many of the authentic Indigenous cultural experiences available to tourists in Canada.

International travellers are particularly important to Indigenous cultural tourism. Compared with Indigenous tourism businesses without a cultural focus, those involved in cultural tourism more frequently mentioned tourists from foreign markets as part of their customer base.

Tourism industry research shows that more than one in three visitors to Canada are interested in an authentic Indigenous tourism experience based on research from Destination Canada.

The Indigenous Tourism Association of BC (ITBC) states "Trends in tourism indicate a strong and increasing demand for cultural tourism attractions. Put simply, more and more visitors are looking for experiences that immerse them in a culture different to theirs, allowing them to experience customs and traditions firsthand."[113]

Visitor exit surveys in both PEI and Nova Scotia indicate a strong interest from visitors to the Atlantic region for cultural experiences, festivals, events, culinary, local authentic tourism experiences, and art/artisans. This type of demand can be directly satisfied with authentic Indigenous tourism experiences.

In 2017, the Indigenous Tourism Association of Canada (ITAC) partnered with Destination Canada to research US traveler opinions and understanding of Indigenous tourism in Canada. The report "Aboriginal Tourism US Qualitative Research" summarizes their findings from their in-depth qualitative research conducted to gain a better understanding of US consumer perceptions of Indigenous tourism experiences in Canada.[114] The researchers reviewed the feedback and input from the focus groups and identified four key findings with implications for the Indigenous tourism industry in Canada.

1. Authenticity is Key
2. Interest is there, awareness is low
3. Indigenous cultural experiences stand out
4. Strong & Compelling Positioning

Research shows that most travelers commit to an Indigenous experience after they have arrived at their destination. Results from research led by Destination Canada, lead to the conclusion that for most travelers, engagement in Indigenous tourism experiences is a much valued 'add-on' that arises as an unanticipated side benefit in a broader purposed trip.[115]

Indigenous tourism businesses will have an opportunity to thrive in the new world of tourism in 2021 as it is expected that, post-COVID-19, many travellers will be looking for meaningful, custom experiences that help them feel transformed. Indigenous cultural tourism offerings are in a very strong position to offer a special experience all the more relevant and deeply meaningful to visitors.

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[113] Indigenous Tourism BC Corporate Website: https://www.destinationbc.ca/who-we-are/regional-community-industry-partners/indigenous-tourism/

[114] Destination Canada - Aboriginal Tourism US Qualitative Research: Summary of Findings and Considerations – 2017 - https://www.destinationcanada.com/en/sectors/indigenous-tourism

[115] Destination Canada - Aboriginal Tourism US Qualitative Research: Summary of Findings and Considerations – 2017

The market opportunity for Indigenous tourism in Atlantic Canada is centered on five themes:

1. Indigenous tourism has seen strong steady growth over the past decade
2. Cultural content and authentic sharing allow Indigenous tourism to stand-out in the marketplace
3. Indigenous tourism has consistently been booked late in the path to purchase for consumers
4. There is strong demand for Indigenous tourism from the international marketplace
5. Tourism will rebound from COVID-19 and Indigenous tourism will be in a strong position to offer meaningful experiences in response to shifts in the marketplace.

Indigenous Tourism Supply

The National research completed by the Indigenous Tourism Association of Canada (ITAC) in 2018 produced by the Conference Board of Canada identified, by province, the number of businesses categorized by tourism industry sector.

Atlantic Canada represents just over 9% of the national total of 1,875 Indigenous tourism businesses as of 2018.[116] Newfoundland and Labrador have the highest number of overall businesses and PEI with the fewest businesses.

Breakdown of Indigenous Tourism Business Inventory by Sector and Province

Tourism Sector	N.B.	N.L.	N.S.	P.E.I.	Atlantic	Canada
Accommodation	2	19	1	n/a	**22**	344
Arts & Heritage	18	21	14	10	**63**	518
Food & Beverage	13	6	3	2	**24**	159
Gaming	6	n/a	1	n/a	**7**	35
Recreation & Outdoor Adventure	2	2	n/a	1	**5**	251
Transportation	2	11	n/a	1	**14**	120
Travel Services (includes retail)	7	11	8	4	**30**	373
Other	1	2	2	2	**7**	75
Total of All Sectors	**51**	**72**	**29**	**20**	**172**	**1875**

Source: Canada's Indigenous Tourism Sector - Insights and Economic Impacts, Conference Board of Canada 2018

The highest proportion of Indigenous tourism businesses in Atlantic Canada is in the Arts & Heritage sector which is consistent with the overall Canadian numbers. Atlantic Canada has just five businesses (or under 3% of the total) that are Recreation and Outdoor Adventure whereas in Canada this sector of Indigenous tourism represents over 13% of all businesses. Accommodations in Atlantic Canada also represent a smaller percentage of the overall businesses (11%) as compared to Canada (18%).

The industry engagement process of this project identified the types of tourism products offered by the 48 survey respondents who are Indigenous tourism operators/suppliers. The supplier survey asked the respondents to share the types of tourism products offered by their business. The majority of respondents primarily offer accommodations (25%), retail (21%) or tours and related services (17%). Many of the respondents also offer outdoor & adventure experiences, an attraction (like a cultural display or physical infrastructure) and food & beverage. Attractions, however, are rarely the primary product or experience offered by the respondents at just 4%.

The supplier survey also showed that slightly over half (56%) of the supplier respondents who responded operate their business off-reserve as compared to 44% who are on-reserve. Respondents showed that 71% represent entrepreneur-owned businesses as compared to 29% who represent

[116] ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

community-owned tourism businesses. Relating to business ownership structure, the survey responses showed that 80% of the respondents represent for-profit businesses with 40% running a for-profit corporation and 36% running a sole proprietorship and 4% having a partnership ownership structure. The remaining 20% of supplier respondents are established as not-for-profit corporations.

Supplier respondents were asked to self-assess their level of business readiness based on tourism industry standards. The majority of respondents are at market-ready (35%) or visitor-ready (25%) with 23% of respondents at export-ready.

A significant percentage of the supplier respondents (45%) had less than five staff and 57% of respondents earn less than $100,000 in annual revenues including 38% with less than $50,000 demonstrating that the majority of Indigenous tourism businesses in Atlantic Canada are small enterprises.

The industry engagement process also asked tourism industry support organizations to recommend, based on their experience, the types of tourism products they would recommend for future product development for Indigenous tourism in Atlantic Canada. Respondents indicated that their priority recommendation for development is in the 'Outdoors and adventure' tourism category. The second-most frequently recommended development category is "tours and related services" which includes cultural sharing workshops, tour operators, and travel agencies. Attractions, accommodations, food & beverage, and retail were also top recommendations.

The status of the Indigenous tourism supply in Atlantic Canada is centered on four themes:

1. Atlantic Canada has a small number of authentic Indigenous tourism businesses in comparison to the overall size of the industry and only a small percentage of the businesses are at a medium to high level of business readiness.
2. Most of the Indigenous tourism businesses in the Atlantic region are centered around arts & heritage and retail offerings along with gaming and food & beverage businesses. In comparison to the rest of Canada, the region has relatively few accommodation and outdoor adventure products.
3. Indigenous tourism businesses tend to be small enterprises that are entrepreneur-owned (non-community owned).
4. Tourism industry representatives in the region recommend product development expansion and investment should be centered around outdoor & adventure experiences and tours and in comparison to Canadian-wide trends, product development plans should also consider accommodations.

<u>Supports Needed</u>

Tourism industry operators or suppliers have access to many forms of support, guidance, and assistance. Typically, the supports offered to tourism businesses by a variety of organizations are:

- Marketing and promotions with a Destination Marketing Organization (DMO)
- Business development programs
- Market and industry research
- Technical support (IT/website, finance/accounting, legal, human resources)
- Access to financing, capital, grant funding
- Advocacy, leadership from support organizations
- Community-based support programs
- Tourism service skills training, customer service
- Management training programs

The industry engagement completed for this report collected data from the Indigenous tourism suppliers regarding the types of support they access and the types of support they need.

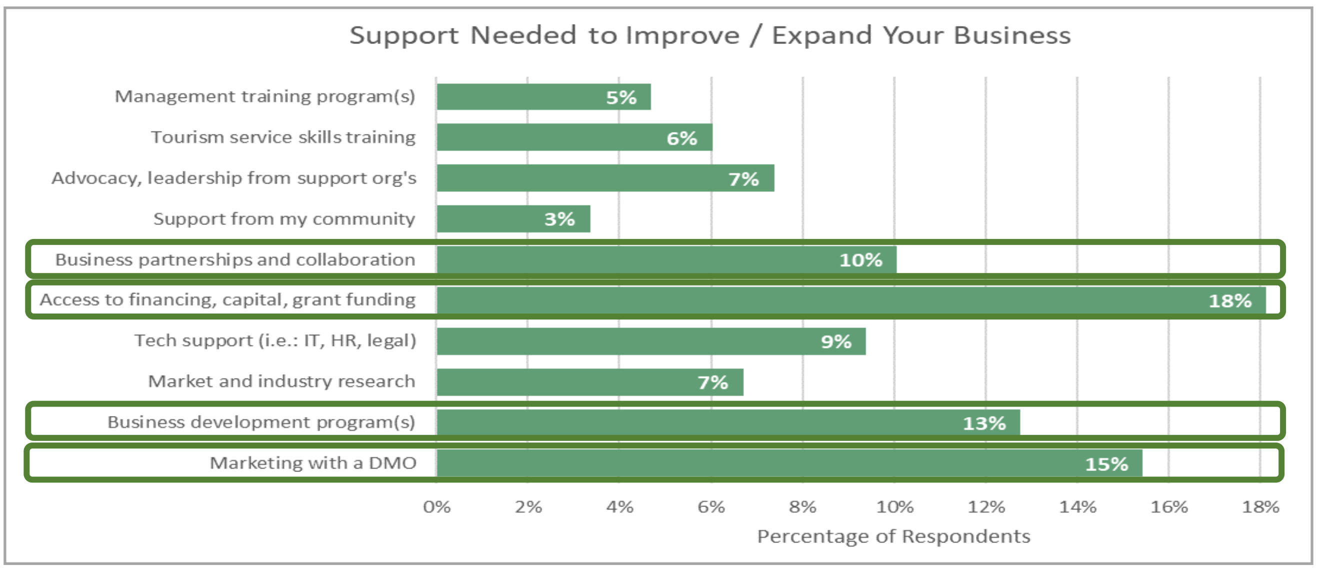
The top four types of supports the supplier respondents had used or accessed in the last three to five years (in order) are:

- Access to financing, capital, grant funding – 17%
- Business development programs – 15%
- Tourism service skills training – 13%
- Marketing with a DMO – 11%

Just 5% of respondents indicated that they had used no support opportunities in the last three to five years and that management training and industry research was accessed by only 6% of the respondents.

The bar chart below depicts the priority supports needed by suppliers to improve or expand their business. The top four priority supplier supports needed are:

- Access to financing, capital, grant funding – 18%
- Marketing with a DMO – 15%
- Business development programs – 13%
- Business partnerships and collaboration – 10%



This information is helps to identify opportunities to increase the quality and quantity of support in the areas of funding, marketing, business development and partnerships.

Interestingly, access to financing is the top support being accessed and is also the top support needed. This likely indicates that a) financing is not being provided at a high enough level or volume to satisfy the needs and/or b) financing is potentially a dependency of suppliers and may reflect a challenging level of true business sustainability.

The industry engagement also discovered that both the suppliers and supporters of Indigenous tourism agree that support is required to assist with two key challenges:

1. Low number of market/export-ready Indigenous tourism products
2. Supplier challenges with achieving or maintaining market/export-ready business practices

These common challenges identified by both suppliers and supporters help confirm this key priority for improving and expanding support to Indigenous tourism businesses for product development to achieve market/export-ready levels.

An analysis of supports needed by Atlantic Indigenous tourism suppliers reveals four themes:

1. Most suppliers of Indigenous tourism in Atlantic Canada actively receive support centered around three main components:
    a. Financing
    b. Business development & training
    c. Marketing
2. The suppliers are looking for more support to improve their business in those same three components listed above however also seek additional support with business partnerships and collaboration. Support with business partnerships, however, is not a key form of support currently offered by existing industry support organizations surveyed in this report.
3. Access to financing is listed frequently as an industry challenge and support that is required. Businesses also list financing as the most common form of support they already receive. More investigation, potentially on a case by case basis, is required to determine a) the types of access to financing that is required and most useful and b) the potential unintentional development of a grant funding overdependency in the Indigenous tourism industry.
4. Both Indigenous tourism suppliers and supporters both agree that support is required to assist with product development of Indigenous experiences at a market/export-ready level and that businesses are challenged with meeting or sustaining these industry-based levels that reflect consumer expectations.

<u>Support Services Offered & Available</u>

Many organizations in the Atlantic region offer a wide range of supports to assist tourism businesses with their economic sustainability and positive impact on the economy. As listed in the previous segment, the forms of support range from business development support, marketing, training, leadership, advocacy and industry research.

This report has researched over 130 organizations in the Atlantic region that provide various forms of support to tourism industry businesses. Based on their primary form of support the breakdown of types and quantity of organizations in the region is:

- Marketing & Business Development Support Organizations: 54
- Funding & Lending Support Organizations (including government-led programs): 56
- Other Support Organizations (training, technical support etc.): 24

This large number of organizations typically are limited to what they can provide and to whom based on geography (i.e.: provincial, local/municipal support organizations) or their organization's mandate (i.e.: to increase market awareness, to grow product development etc.).

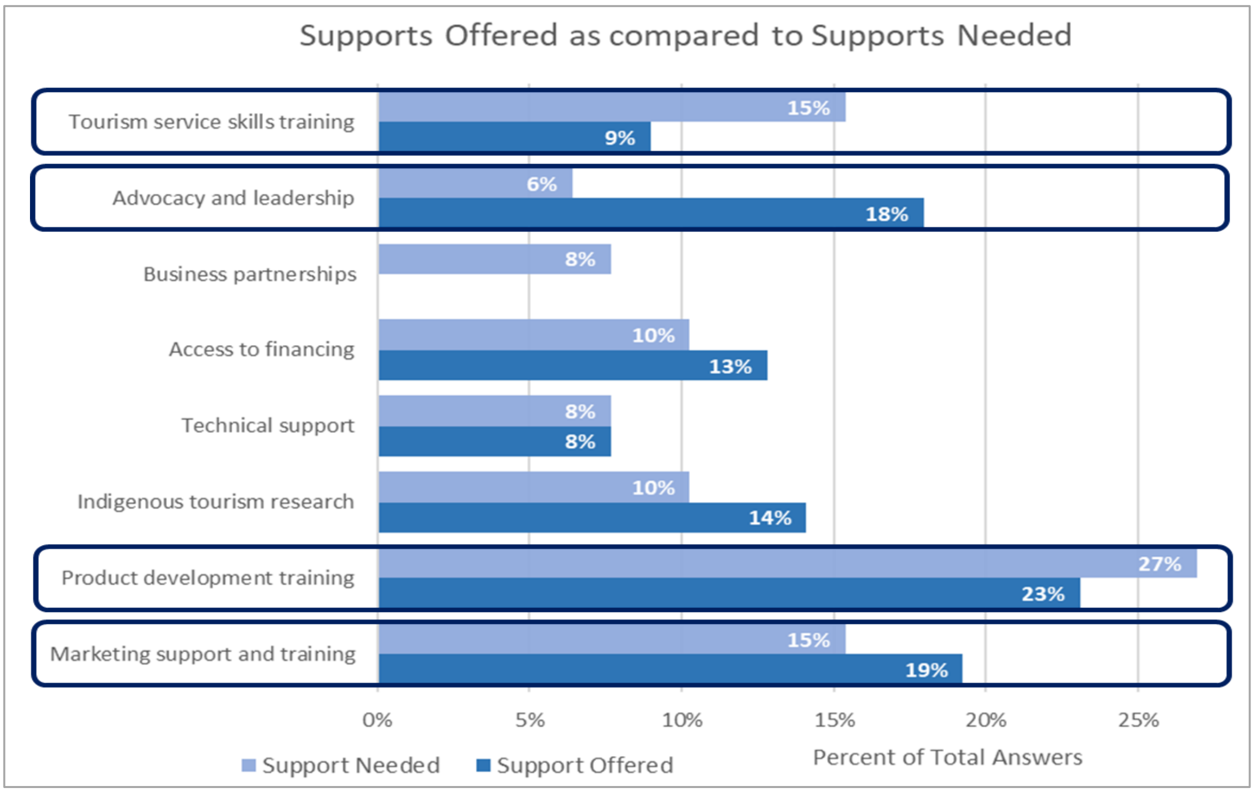
The majority of these organizations have specific eligibility and application requirements to assist in identifying potential recipients for the support available. These requirements can be daunting to the applicant; for example, a key challenge listed in the survey research collected from supporting organizations indicated that there is confusion or uncertainty in accessing funding and capital that is available.

The industry engagement completed for this report collected data from support organizations who assist Indigenous tourism suppliers. The data collected included the types of support they offer and the types of support they recommend.

The bar chart below shows a summary of the responses from the supporting organizations who indicated the supports they offer and their recommended supports most needed by Indigenous tourism operators/suppliers.

The chart shows that there is a concentration of supports offered in marketing, product development and advocacy/leadership with a lower number of organizations offering business partnership, technical and research support. The previous section of this report relating to supports needed listed access to financing as a top support needed however only 10% of the support organization survey respondents indicated they offer this form of support.

The supporting organizations indicated that the top two forms of support offered are also the top two forms needed by Indigenous tourism suppliers: product development training and marketing support and training. Supporters also most often offer advocacy & leadership and research. Tourism service skills training is tied for the second most recommended support needed but is only offered by 9% of the respondents. Advocacy & leadership is the third-most frequent support offered but is the lowest category of support recommended.



An analysis of supports offered by industry support organizations to Indigenous tourism suppliers in Atlantic Canada reveals four themes:

1. There are numerous organizations in Atlantic Canada offering support to Indigenous tourism businesses however often have limitations in terms of eligibility and volume of businesses they can assist and complexity of their application process.
2. The majority of support organizations offer product development training and marketing which matches two of the priority needs of most Indigenous tourism businesses in the region.
3. Advocacy and leadership are also frequently offered however both suppliers and supporters do not show this as a priority need as compared to other Indigenous tourism business needs.
4. The survey respondents indicated they do not offer support for business partnerships and the background research completed from online resources showed fewer than 10 support organizations list this as a service they offer out of over 130 organizations researched.

Gaps within Atlantic Region Indigenous Tourism

The primary research collected in this project provides data to be compared, contrasted, and analysed for gaps. The gaps identified below assist in identifying and developing recommendations to alleviate or respond to the gaps that exist in order to better support the growth and economic sustainability of Indigenous tourism in Atlantic Canada.

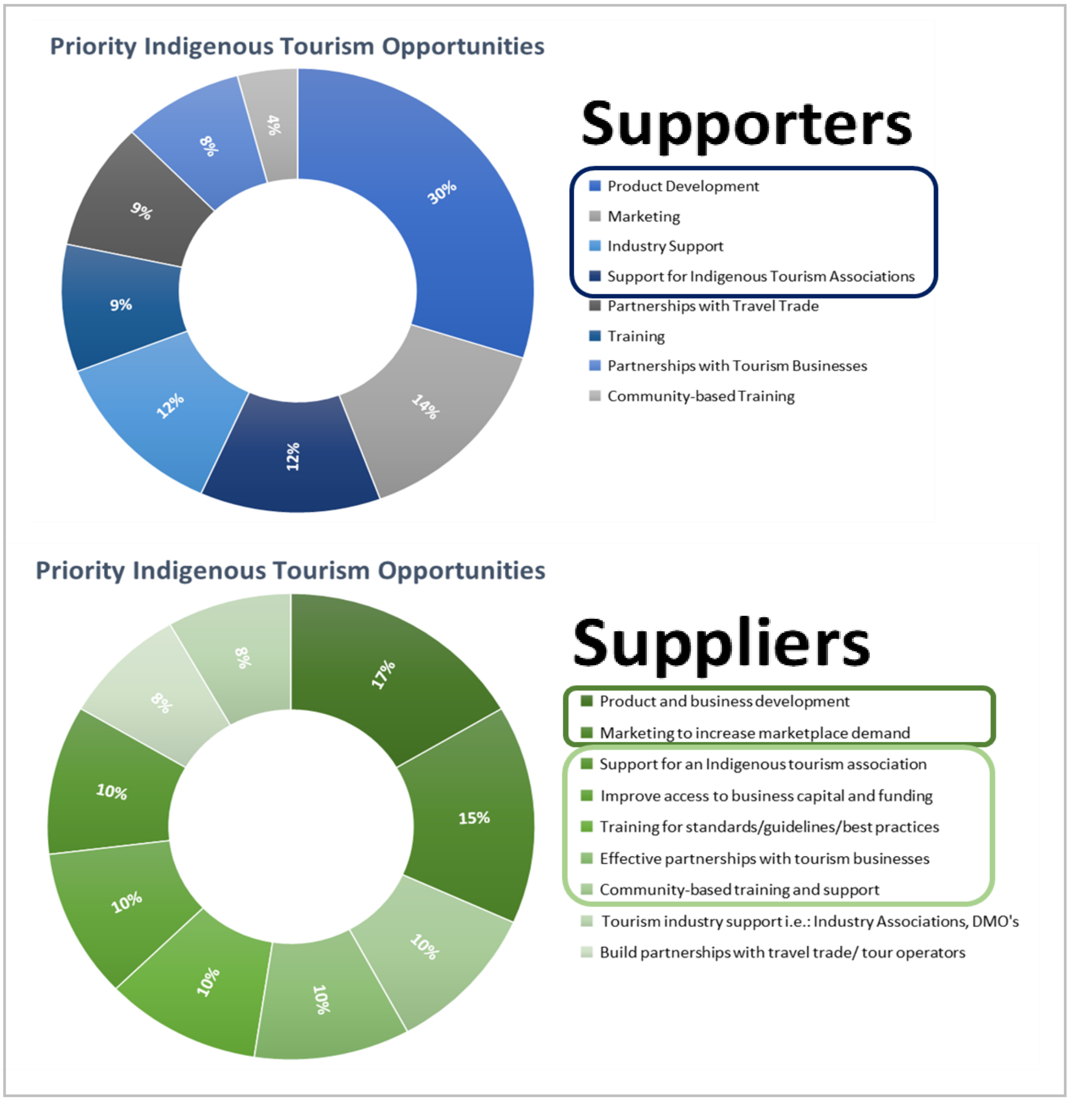
The gaps identified are grouped into three categories:

i. Atlantic Region
ii. Province by Province
iii. Community-owned vs. Entrepreneur-owned

Atlantic Canada Gap Analysis

Within the Atlantic region, the following gaps were identified when comparing primary survey data collected from both Indigenous tourism suppliers/operators and supporters of Indigenous tourism.

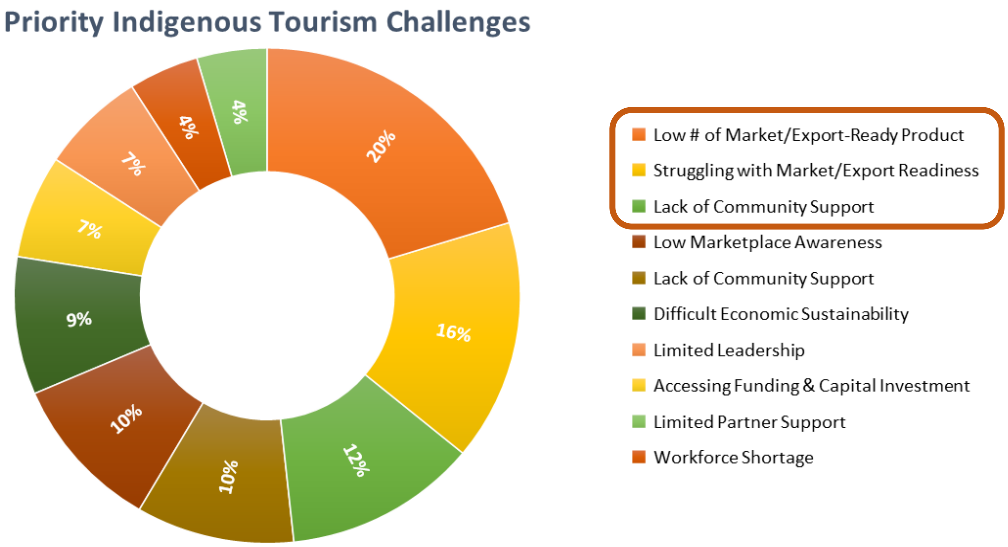
The circle charts below compare the top responses from Indigenous tourism suppliers to the top responses from supporters of Indigenous tourism comparing their thoughts on priority opportunities for Indigenous tourism in the region.



Based on the data collected, both the suppliers and supporters agree that the top opportunities are product development, marketing, and support for an Indigenous tourism association. This lack of a gap is equally important to identify as it demonstrates where suppliers and supporters are aligned and recommendations can therefore be designed moving forward from this place of alignment.

Supporting organizations also feel industry support is a key opportunity which is typically provided through advocacy, research and provision of support programs and projects. Suppliers/operators feel that access to capital and funding, training and partnerships are also key opportunities.

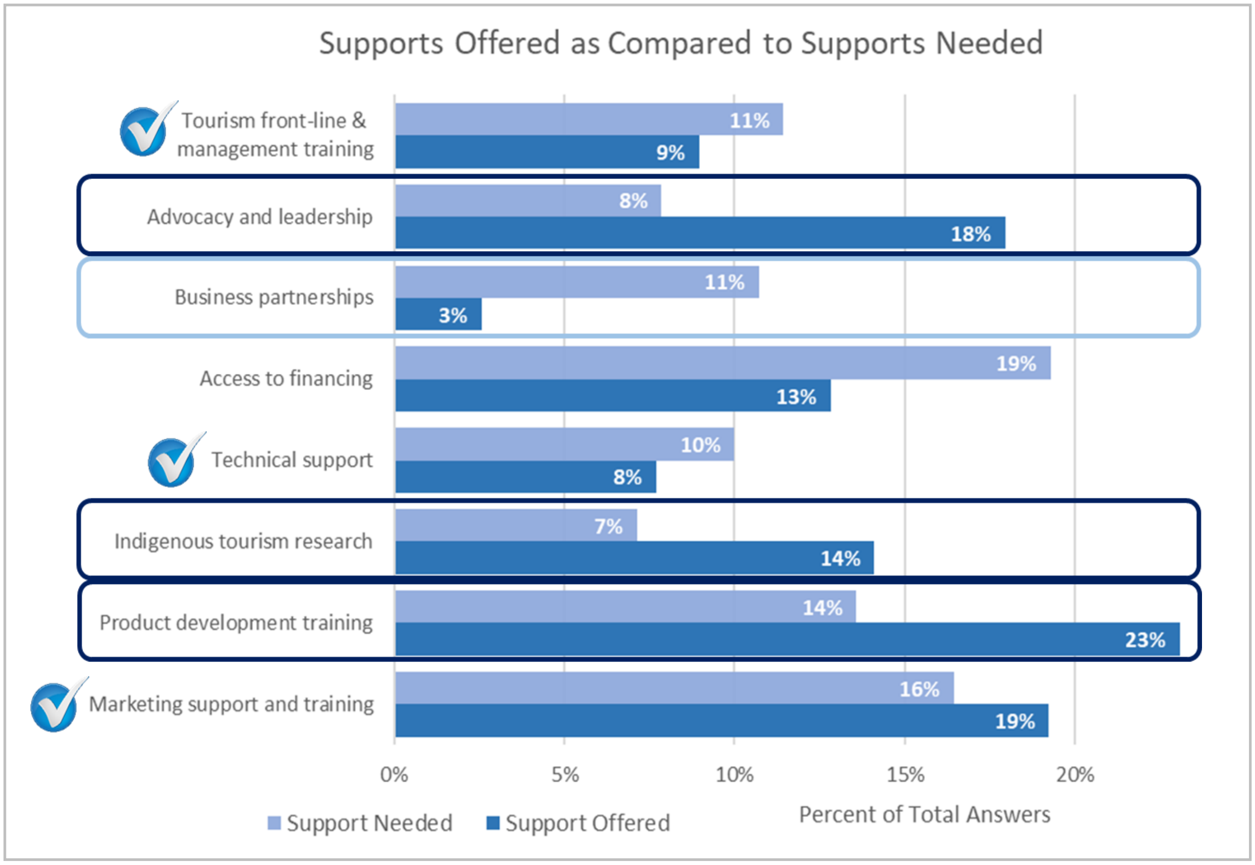
The two circle charts below compare the top responses from Indigenous tourism suppliers to the top responses from supporters of Indigenous tourism comparing their thoughts on priority challenges for Indigenous tourism in the region.



Both the Indigenous tourism suppliers and supporters agree that the low number of market and export-ready products and difficulty in reaching or maintaining those standards are key challenges for Indigenous tourism in the region. Project recommendations will include the need to focus on market and export business readiness when designing product development support programs.

Supporters also feel there is a lack of community support while suppliers feel there is limited partner support and low marketplace awareness as well as uncertainty in accessing funding and capital support.

The stacked bar chart below shows the supports needed by Indigenous tourism suppliers (based on supplier survey responses) as compared to the supports offered by Indigenous tourism suppliers (based on supporter survey responses). The light blue bars show supports needed based on supplier responses and the darker blue bars show the types of supports offered.



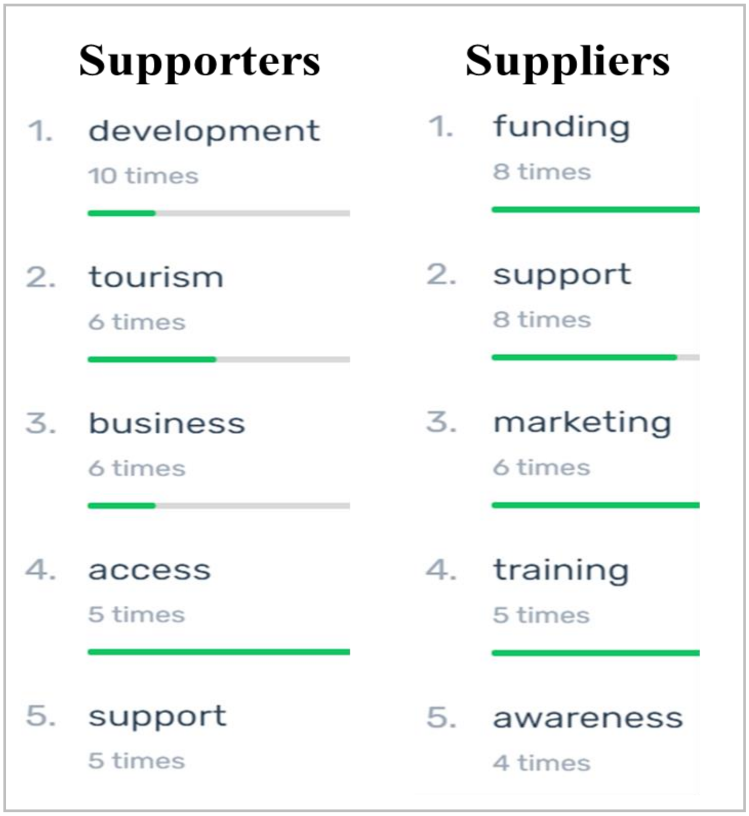
Several gaps can be identified when comparing the results of supports needed by suppliers to supports offered by supporting organizations.

Product development training is the most common support offered however is shown to be the third most often support requested by suppliers. Similarly, there is frequent support offering of Indigenous tourism research and advocacy and leadership however these supports are less frequently prioritized by suppliers.

Conversely, business partnerships is the fourth highest support type needed by suppliers however is the least frequently type of support offered which suggests that there are not enough support agencies offering assistance with creating business partnerships. Examples of this type of program would be an industry association or 'chamber of commerce' type organization holding B2B networking events such as an 'Indigenous Business Match'.

The categories with a checkmark indicate there is a similar level of support offered as compared to support required. Training, technical support and marketing support each had a similar percentage of respondents indicating they offer these supports as compared to supplier respondents indicating they are looking for these types of supports.

The supplier and supporter survey each asked respondents to provide an open text response to what they feel is the single biggest priority to help Indigenous tourism grow and strengthen in the region.



The list of key words shown to the left were most often used by the respondents in describing their single top priority.

We can identify gaps based on word frequency identified in the survey responses:

- supporting agencies see business development as the key to grow Indigenous tourism in Atlantic Canada
- suppliers and operators however feel that funding and support is the key
- the common thread, however, is that funding and support that suppliers refer to is typically invested into business development and therefore the top priorities are, indirectly, similar.

The supporting agencies responses tended to refer to the bigger picture of <u>what</u> needs to happen to grow the industry and in comparison, the suppliers are more operational and direct and their responses referred to <u>how</u> the development and growth is going to happen. Below are the word clouds produced by analysing word use frequency by the suppliers and the supporters.

In summary, a gap analysis within the Atlantic region identified the following key issues and observations:

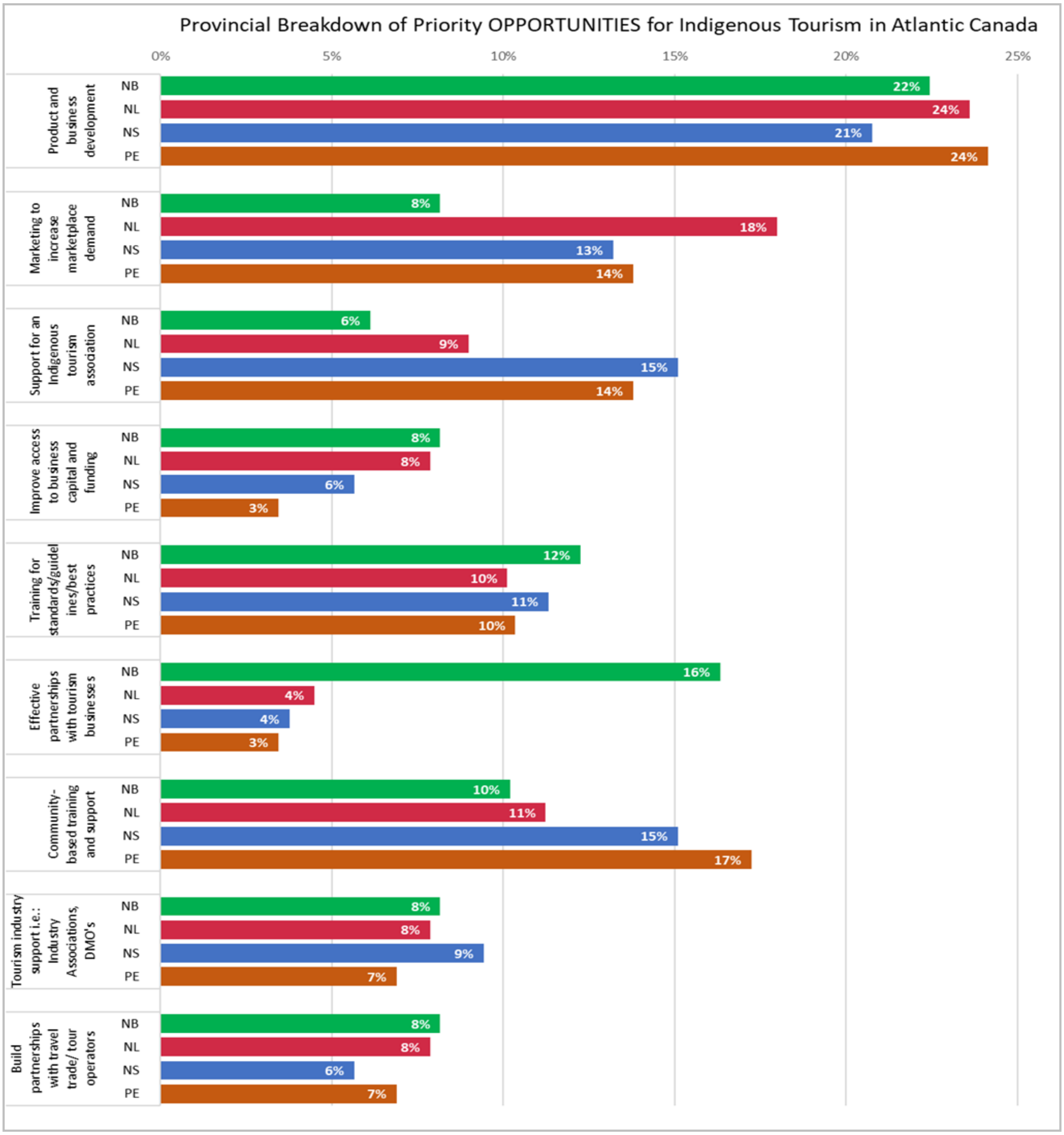
- Both the Indigenous tourism suppliers and supporters agree that the top opportunities to grow and strengthen the Indigenous tourism industry are:
    - product development
    - marketing
    - support for Indigenous tourism associations
- In addition to the key opportunities listed above, supporting organizations also feel industry support is a key opportunity (typically provided through advocacy, research and provision of support programs and projects) while suppliers/operators feel that access to capital and funding, training and partnerships are also key opportunities
- Both the suppliers and supporters agree that the low number of market and export-ready products and difficulty in reaching or maintaining those standards are key challenges for Indigenous tourism in the region
- In addition to the key challenges listed above, supporters also feel there is a lack of community support while suppliers did not list lack of community support as a significant challenge; however suppliers feel there is limited partner support and low marketplace awareness as well as uncertainty in accessing funding and capital support
- With respect to support needs versus support availability, product development training is the most common support offered however is shown to be the third most often support requested by suppliers; Indigenous tourism research and advocacy/leadership is widely available in the region however these supports are less frequently prioritized by suppliers
- Support to develop business partnerships is the fourth highest support needed by suppliers however is the least frequently type of support offered
- Training, technical support and marketing support are equally offered by supporters and requested by suppliers
- Supporting agencies see business development as the key to growth for Indigenous tourism in Atlantic Canada however suppliers and operators however feel that funding and support is the key.

Provincial Gap Analysis

Within the Atlantic region, the primary survey data collected can be sorted based on provincial location of the businesses and supporting organizations. This data was analysed to identify gaps or differences in four key data categories when comparing responses province by province.

The following gaps or differences were identified when comparing primary survey data from each of the four Atlantic region provinces.

The stacked bar chart below compares, province-by-province each of the nine key opportunities listed by both Indigenous tourism suppliers and supporters within their province.



Several opportunities are shown to be a consistent level of priority across the four provinces such as 'product and business development', it is listed as the top opportunity by all four provinces. All provinces also agreed as demonstrated through their responses that support form tourism industry organizations and building partnerships with travel trade were lower on their list of priority opportunities for growing Indigenous tourism.

Several Indigenous tourism opportunity priorities, however, are inconsistent when comparing province-by-province. These provincial differences demonstrate how a region-wide approach may not be equally relevant for all four provinces depending on the type of support provided. These differences will allow supporting agencies within these provinces to better focus their efforts for their provincial clients:

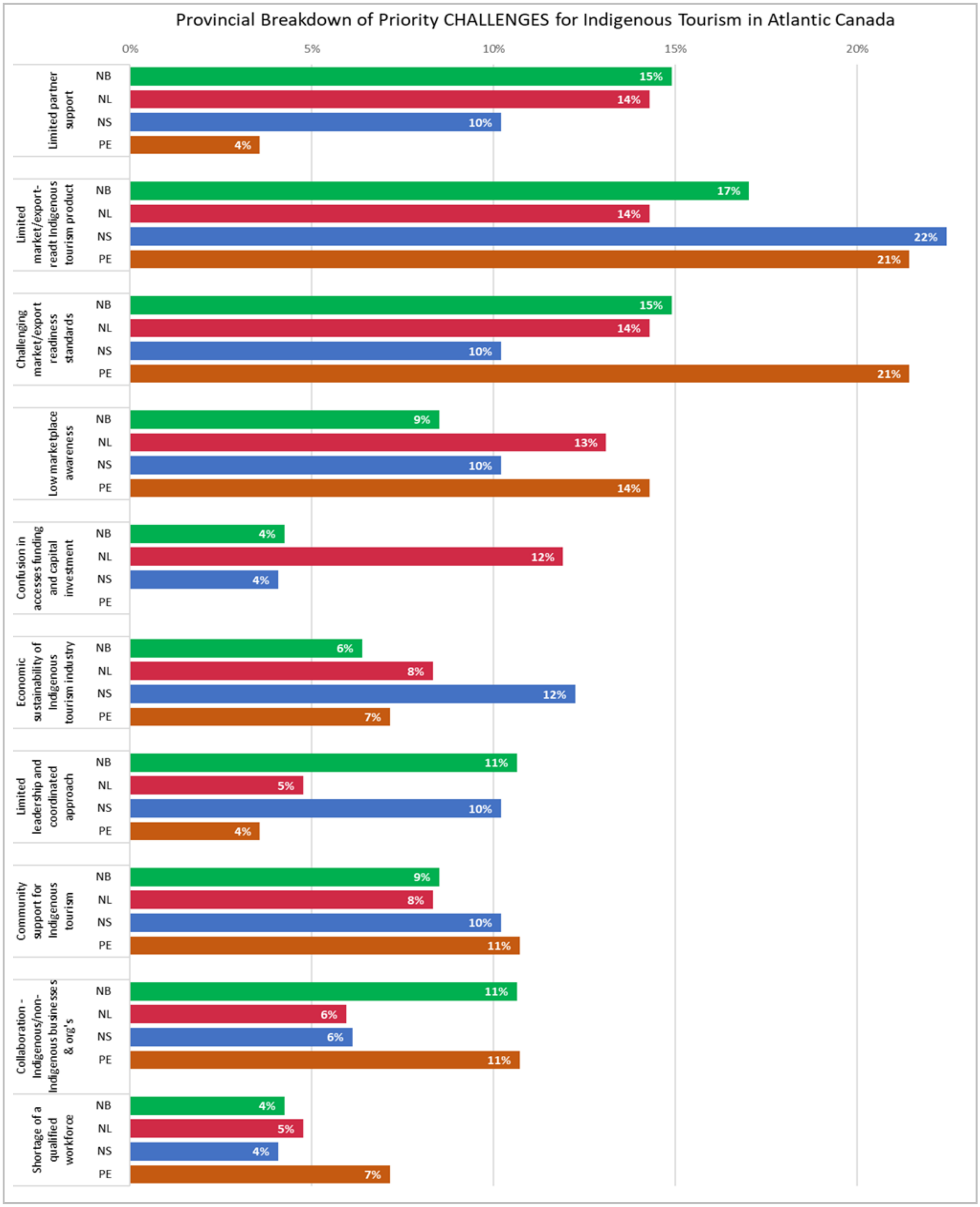
New Brunswick
Opportunities listed more often than other provinces – Effective partnerships with tourism businesses
Opportunities listed less often than other provinces – Marketing to increase awareness, support for an ITA

Newfoundland & Labrador
Opportunities listed more often than other provinces – Marketing to increase awareness
Opportunities listed less often than other provinces – Support for an ITA

Nova Scotia
Opportunities listed more often than other provinces – Community-based training & support, support for an ITA
Opportunities listed less often than other provinces – None

Prince Edward Island
Opportunities listed more often than other provinces – Community-based training & support
Opportunities listed less often than other provinces – Improve access to business capital & funding

The stacked bar chart below compares, province-by-province each of the ten key challenges listed by both Indigenous tourism suppliers and supporters within their province.



Several challenges are shown to be a consistent level of priority across the four provinces such as 'limited market/export-ready Indigenous tourism product', it is listed as the top opportunity by all four provinces. All provinces also agreed as demonstrated through their responses that 'community support for Indigenous tourism' was lower on their list of priority challenges for growing Indigenous tourism.

Several Indigenous tourism priority challenges, however, are inconsistent when comparing province-by-province:

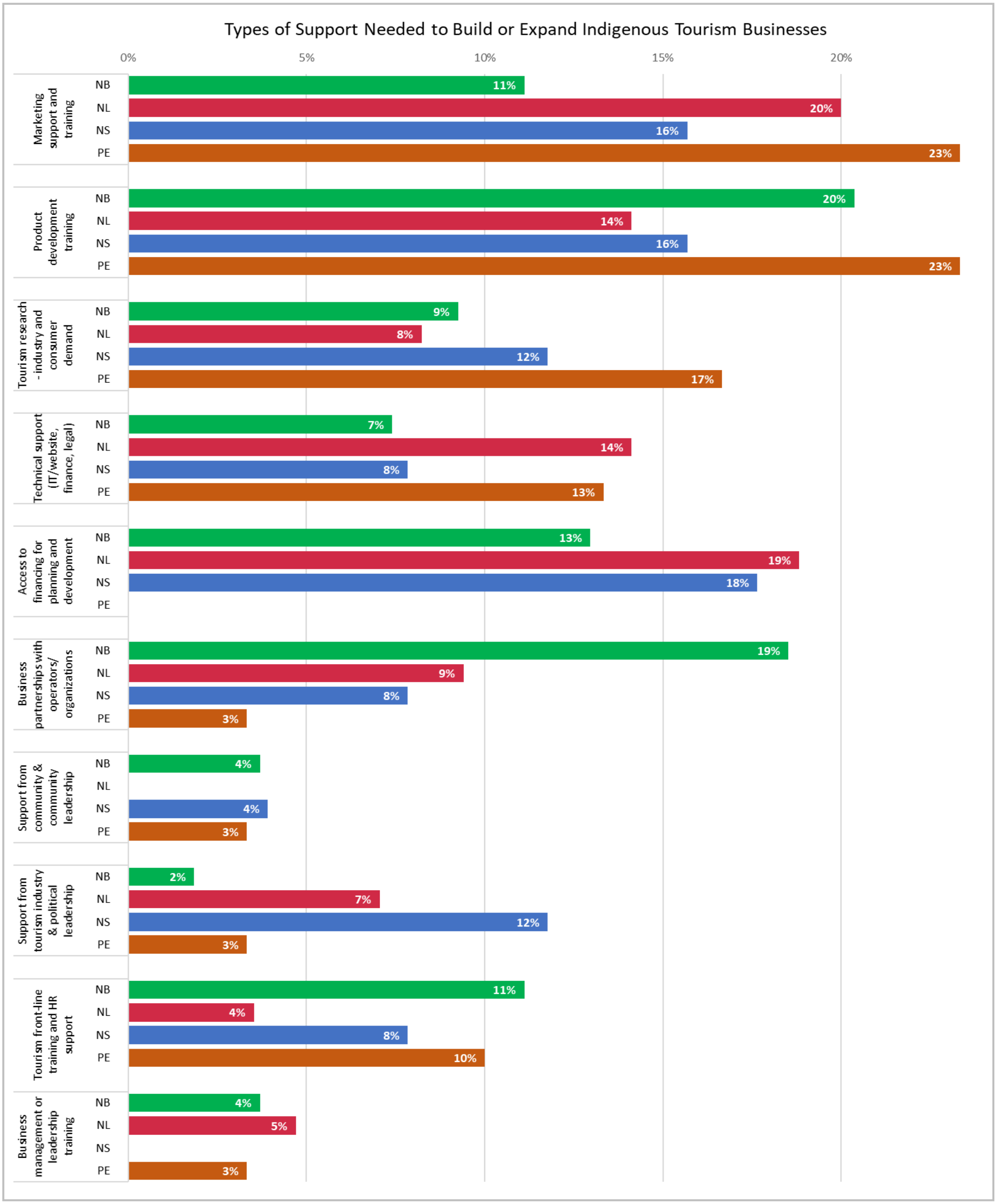
New Brunswick
Challenges listed more often than other provinces – Limited leadership and coordinated approach, collaboration between Indigenous & non-Indigenous businesses and organizations
Challenges listed less often than other provinces – Low marketplace awareness

Newfoundland & Labrador
Challenges listed more often than other provinces – Confusion in accessing funding and capital investment
Challenges listed less often than other provinces – Limited leadership and coordinated approach, collaboration between Indigenous & non-Indigenous businesses and organizations

Nova Scotia
Challenges listed more often than other provinces – Limited leadership and coordinated approach, economic sustainability of Indigenous tourism industry
Challenges listed less often than other provinces – Collaboration between Indigenous & non-Indigenous businesses and organizations, challenging market/export readiness standards

Prince Edward Island
Challenges listed more often than other provinces – Challenging market/export readiness standards, collaboration between Indigenous & non-Indigenous businesses and organizations
Challenges listed less often than other provinces – Limited leadership, limited partner support.

The stacked bar chart below compares, province-by-province each of the ten key types of support needed by Indigenous tourism suppliers within their province.



Several types of support are shown to be a consistent level of priority across the four provinces such as 'marketing support and training' and 'product development training' are both listed as the top two forms of supported needed by all four provinces. All provinces also agreed as demonstrated through their responses that 'support from community' and 'management or leadership training' were lower on their list of priority types of support for growing Indigenous tourism.

Several Indigenous tourism types of support that are a priority, however, are inconsistent when comparing province-by-province:

New Brunswick
Types of support listed more often than other provinces – Product development training, business partnerships with other operators and tourism organizations
Types of support listed less often than other provinces – Support from tourism industry & political leadership, marketing support & training

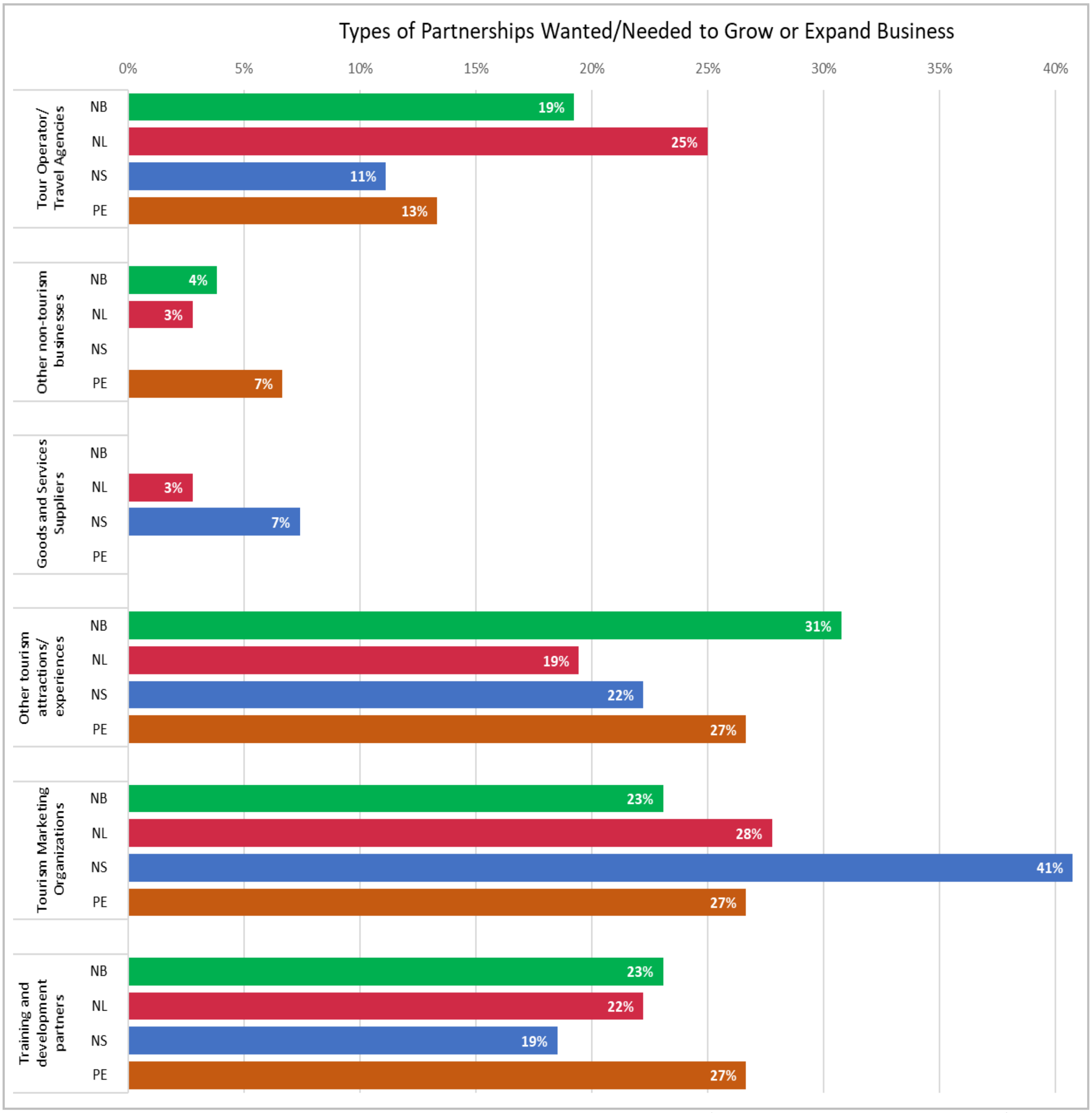
Newfoundland & Labrador
Types of support listed more often than other provinces – Marketing support & training, technical support (legal, financial, H.R. etc.)
Types of support listed less often than other provinces – Tourism front-line training, product development training

Nova Scotia
Types of support listed more often than other provinces – Support from tourism industry & political leadership, access to financing
Types of support listed less often than other provinces – Technical support (legal, financial, H.R. etc.), business management or leadership training

Prince Edward Island
Types of support listed more often than other provinces – Marketing support & training, product development training, tourism research, frontline training
Types of support listed less often than other provinces – Business partnerships with other operators and tourism organizations, support from tourism industry & political leadership

The stacked bar chart below compares, province-by-province each of the six key types of partnerships wanted or needed for Indigenous tourism suppliers to grow or expand their business within their province.

Several types of partnerships are shown to be a consistent level of priority across the four provinces such as 'tourism marketing organizations', 'training & development partners' and 'other tourism attractions/experiences' are all listed as the top three types of partnership needed by all four provinces.



All provinces also agreed as demonstrated through their responses that 'other non-tourism businesses' and 'goods and services suppliers' were lower on their list of priority partnerships for growing Indigenous tourism.

Several Indigenous tourism types of partnerships that are a priority, however, are inconsistent when comparing province-by-province:

New Brunswick
Types of partnerships listed more often than other provinces – Other tourism attractions or experiences
Types of partnerships listed less often than other provinces – Tourism marketing organizations

Newfoundland & Labrador
Types of partnerships listed more often than other provinces – Tour operators/ travel agencies
Types of partnerships listed less often than other provinces – Other tourism attractions or experiences

Nova Scotia
Types of partnerships listed more often than other provinces – Tourism marketing organizations
Types of partnerships listed less often than other provinces – Tour operators/ travel agencies

Prince Edward Island
Types of partnerships listed more often than other provinces – Training & development partners
Types of partnerships listed less often than other provinces – Tour operators & travel agencies

In summary, a gap analysis comparing the research from the four provinces of the Atlantic region identified the following key issues and observations.

New Brunswick:
In comparison to the other Atlantic provinces, NB has specific priorities to address:
1. This province is looking for help in developing effective partnerships with other tourism businesses (B2B partners) and product development training
2. NB feels that their province particularly struggles with leadership and coordinated approach, and collaboration between Indigenous & non-Indigenous businesses and organizations.

Newfoundland & Labrador:
In comparison to the other Atlantic provinces, NL has specific priorities to address:
1. This province is looking for help in marketing to increase awareness, marketing training and technical support (legal, financial, H.R. etc.)
2. NL feels that they struggle more than other provinces with uncertainty or confusion in accessing funding and capital investment.

Nova Scotia:
In comparison to the other Atlantic provinces, NS has specific priorities to address:
1. NS is looking for community-based training & support, support for an Indigenous tourism association, support from tourism industry & political leadership and access to financing
2. NS feels that they struggle more than other provinces with limited leadership and coordinated approach and the economic sustainability of Indigenous tourism industry
3. NS also shows a specific interest in partnerships with tourism marketing organizations.

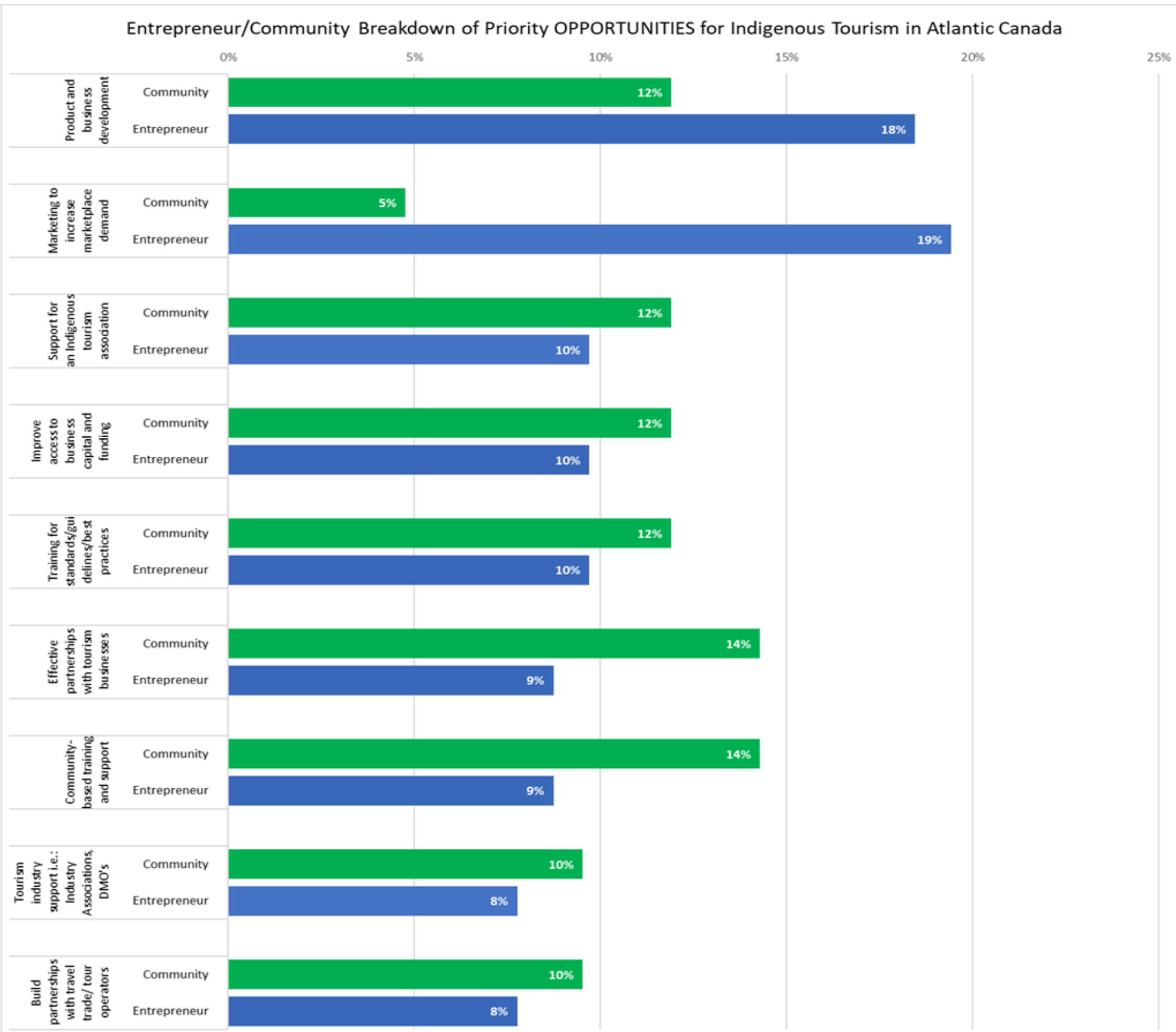
Prince Edward Island:
In comparison to the other Atlantic provinces, PEI has specific priorities to address:
1. This province is looking for community-based training & support, marketing support, product development training, tourism research, frontline training, and development partnerships
2. PEI feels that they struggle more than other provinces with market/export readiness standards, and collaboration between Indigenous & non-Indigenous organizations.

Comparing Community-Owned to Entrepreneur/Non-Community-Owned

Within the Atlantic region, the primary survey data collected was also sorted based on if the ownership of the tourism supplier or operator was community-owned or entrepreneur-owned. This data was analysed to identify gaps or differences in four key data categories when comparing responses based on if the business was community or non-community owned.

The following gaps or differences were identified when comparing primary survey data collected from community and non-community owned Indigenous tourism businesses.

The stacked bar chart below is a breakdown of priority opportunities comparing community versus entrepreneur owned businesses for each of the nine key opportunities listed by Indigenous tourism suppliers in Atlantic Canada.



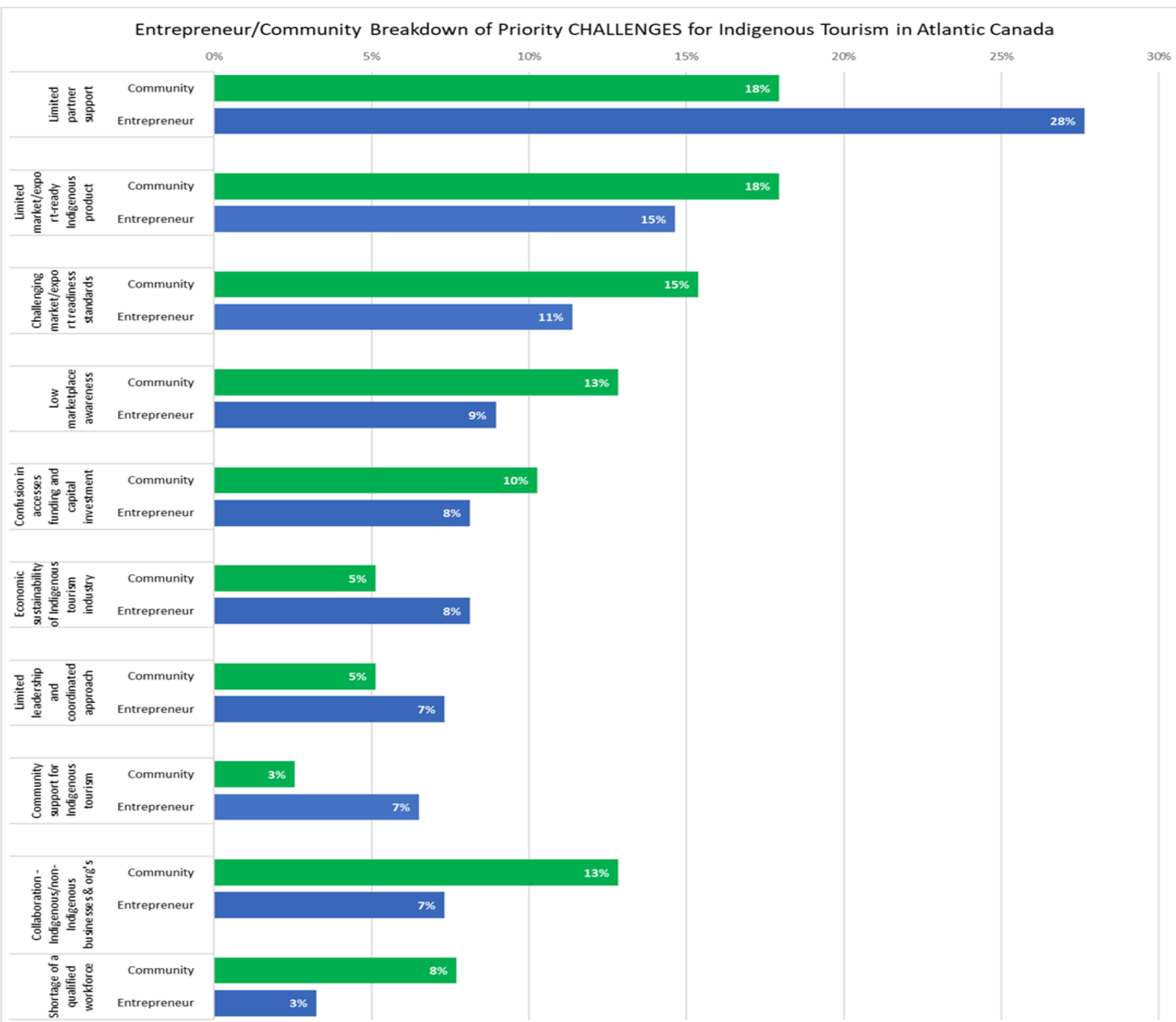
Several opportunities are shown to be a consistent level of priority for both community and non-community owned tourism businesses such as 'product and business development' as it is listed as the top opportunity by both types of ownership. Both types of ownership also agreed as demonstrated through their responses that partnerships, tourism industry support, training, support for an Indigenous tourism association and access to funding were listed at a similar level of priority opportunities for growing Indigenous tourism.

Several Indigenous tourism opportunity priorities, however, are inconsistent when comparing community and non-community owned business responses. These differences demonstrate how a region-wide approach may not be equally relevant for all types of business ownership depending on the type of support provided. These differences will allow supporting agencies who focus on one type of ownership to better focus their efforts for their clients.:

Community-Owned Indigenous Tourism Businesses
Opportunities listed more often than non-community-owned businesses – Community-based training & support, effective partnerships with tourism businesses

Non-Community-Owned (or Entrepreneur-Owned) Indigenous Tourism Businesses
Opportunities listed more often than community-owned businesses – Marketing to increase marketplace demand, product and business development

The stacked bar chart below is a breakdown of priority challenges comparing community versus entrepreneur owned businesses for each of the ten key challenges listed by Indigenous tourism suppliers in Atlantic Canada.



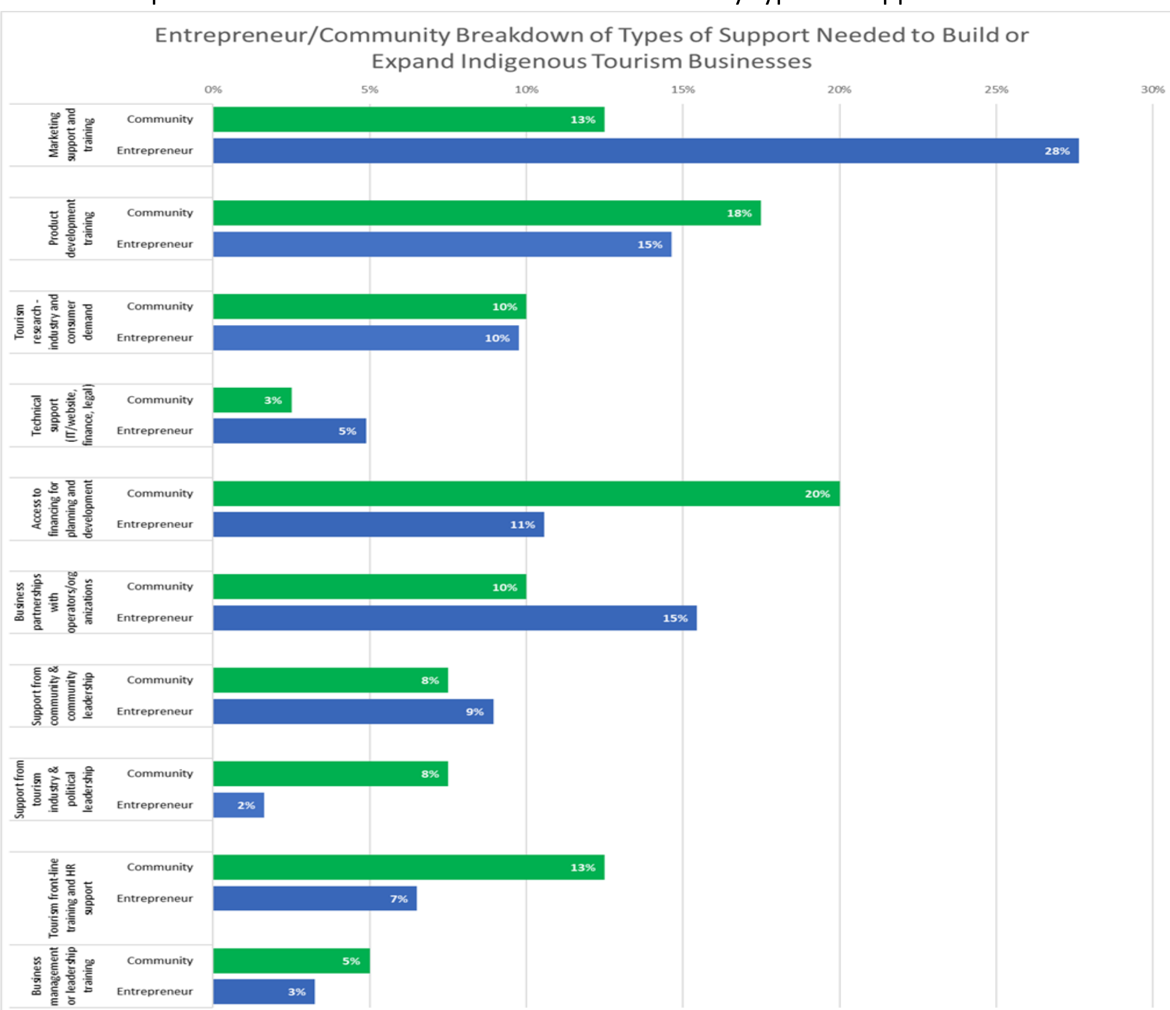
Several challenges are shown to be a consistent level of priority for both community and non-community owned tourism businesses such as 'limited market/export-ready Indigenous tourism products' as it is listed as the second most significant challenge by both types of ownership. Both types of ownership also agreed that access financial support, and limited leadership were priority challenges.

However, several Indigenous tourism challenges are inconsistent when comparing community and non-community owned business responses. These differences will allow supporting agencies who focus on one type of ownership to better focus their efforts for their clients.:

Community-Owned Indigenous Tourism Businesses
Challenges listed more often than non-community-owned businesses – Limited partner support, community support for Indigenous tourism

Non-Community-Owned (or Entrepreneur-Owned) Indigenous Tourism Businesses
Challenges listed more often than community-owned businesses – Challenges with business readiness standards, marketplace awareness, shortage of a qualified workforce and collaboration Indigenous/non-Indigenous businesses and organizations

The stacked bar chart below is a breakdown of the types of support needed comparing community versus entrepreneur owned businesses for each of the ten key types of support available.



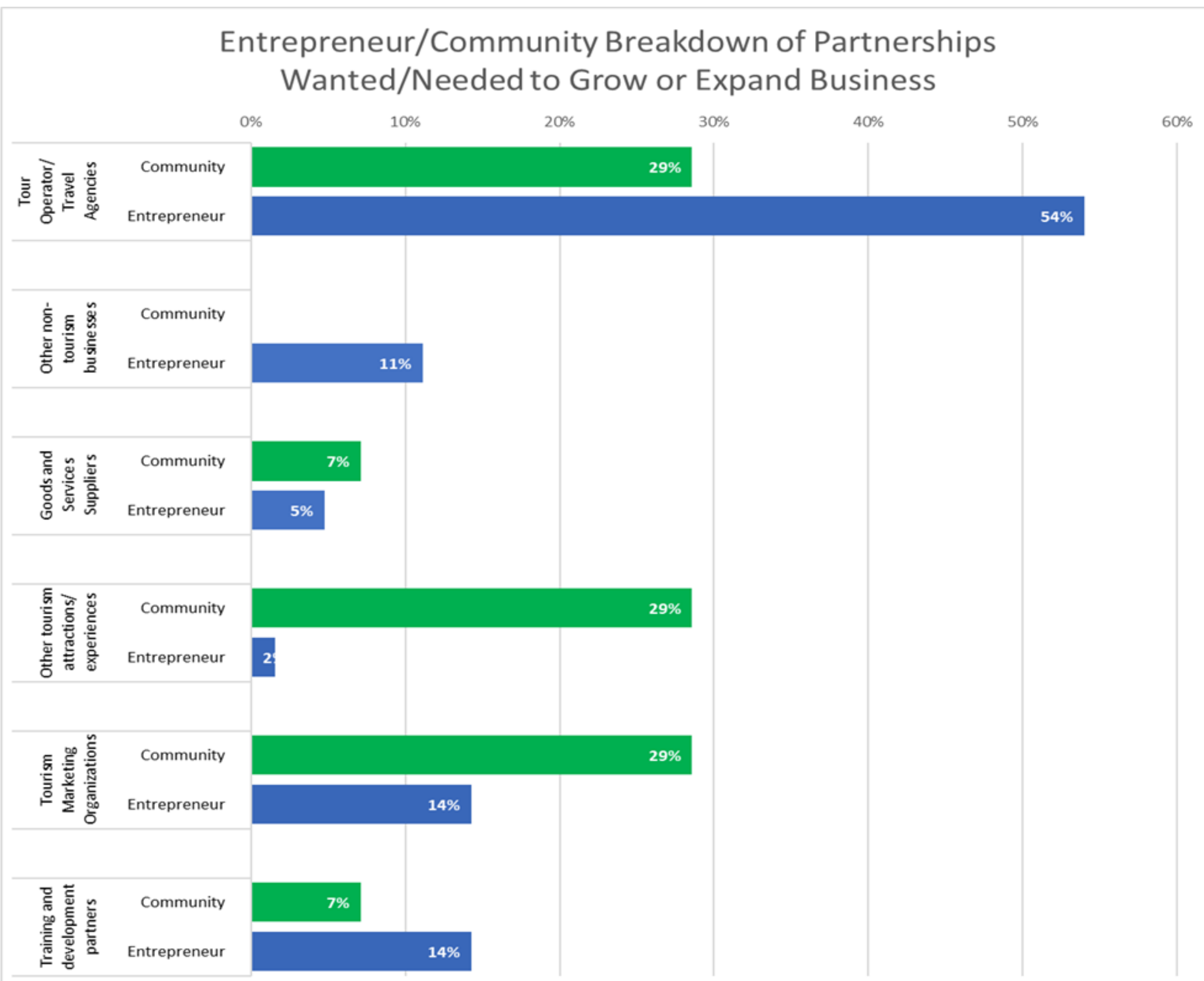
Several types of support are shown to be a consistent level of priority for both community and non-community owned tourism businesses such as 'product development training' as it is listed as one of the top types of support needed by both types of ownership. Both types of ownership also agreed that tourism research, support from community and business management were similar levels of priority.

However, several types of support are inconsistent when comparing community and non-community owned business responses:

Community-Owned Indigenous Tourism Businesses
Types of support listed more often than non-community-owned businesses – Access to financing, support from the tourism industry, front-line training support

Non-Community-Owned (or Entrepreneur-Owned) Indigenous Tourism Businesses
Types of support listed more often than community-owned businesses – Marketing support & training, business partnerships

The stacked bar chart below is a breakdown of the types of partnerships needed comparing community versus entrepreneur owned businesses for each of the six key types of partnerships typically available.



Several types of partnerships are shown to be a consistent level of priority for both community and non-community owned tourism businesses such as ‘goods and services providers’ as it is listed as one of the lower types of partnerships preferred by both types of ownership. Both types of ownership also agreed that training and development partnerships were similar levels of priority.

However, several types of preferred partnerships are inconsistent when comparing community and non-community owned business responses:

Community-Owned Indigenous Tourism Businesses
Types of preferred partnerships listed more often than non-community-owned businesses – Other tourism attractions and experiences, tourism marketing organizations

Non-Community-Owned (or Entrepreneur-Owned) Indigenous Tourism Businesses
Types of preferred partnerships listed more often than community-owned businesses – Tour operators/travel agencies, other non-tourism businesses, training & development partners

In summary, a gap analysis comparing the research from Atlantic operators who are community-owned and non-community-owned identified the following key issues and observations.

Community-Owned Indigenous Tourism Suppliers/Operators:

In comparison to non-community-owned suppliers, community-owned suppliers and operators have specific priorities to address:

1. Community-owned suppliers see a greater need for community-based training, access to financing, support from the tourism industry, and front-line training support
2. These operators see limited partner support and community support as a greater challenge
3. They are looking for improved partnerships with other tourism businesses and with tourism marketing organizations.

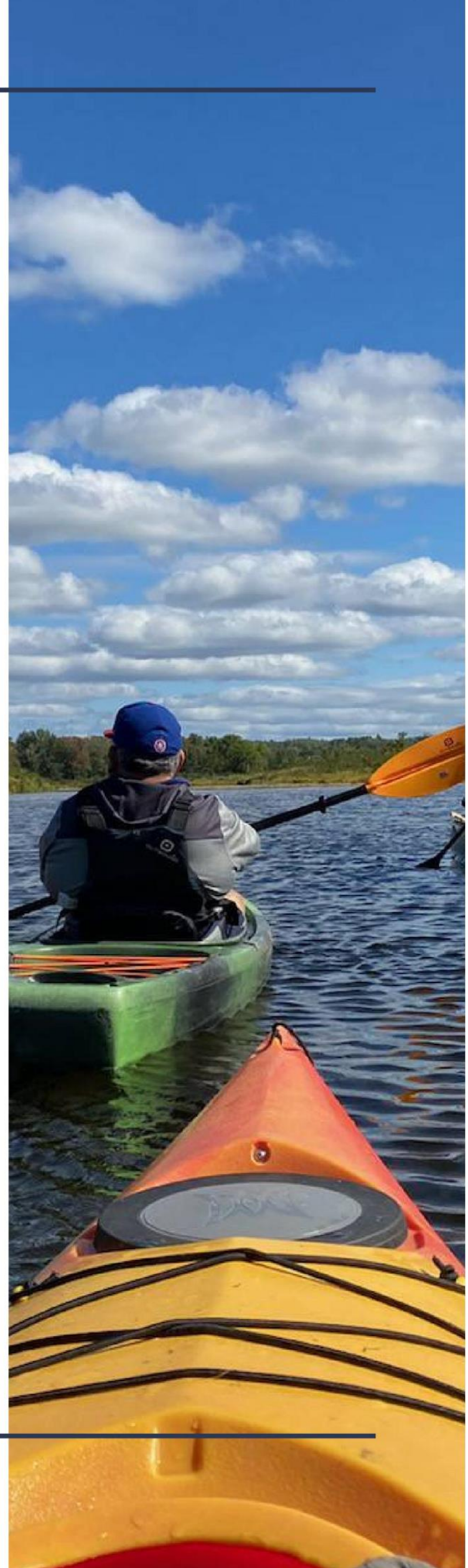
Non-Community-Owned Indigenous Tourism Suppliers/Operators:

In comparison to community-owned suppliers, non-community-owned suppliers and operators have specific priorities to address:

1. Non-community-owned suppliers see a greater need for increased marketing, marketing training and product & business development
2. These operators see business readiness standards, marketplace awareness and workforce shortages as a greater challenge
3. Partnerships they are looking to improve are with the travel trade, Indigenous/non-Indigenous businesses & organizations, and training & development partners.

RECOMMENDATIONS

THIS SECTION PROVIDES RECOMMENDATIONS BASED ON THE RESEARCH AND INDUSTRY ENGAGEMENT



Recommendations

This study has been designed and built to provide direction, guidance, and priority recommendations to assist in identifying economic opportunities as well as the needs and barriers in the tourism sector for First Nations and Inuit communities in Atlantic Canada.

The following section summarizes the recommendations and priority direction based on the research, engagement and data analysis detailed in the preceding sections of this study. The recommendations and priorities are organized into the following categories:

- Overall Recommendations – for all Indigenous tourism operators and supporting organizations in Canada
- Regional Recommendations for Atlantic Canada – specifically for the Atlantic region
- Provincial Priorities within Atlantic Canada – specifically for each Atlantic province
- Ownership-Based Priorities within Atlantic Canada – specifically for community-owned and entrepreneur-owned Indigenous tourism businesses in Atlantic Canada

Overall Recommendations to Grow Indigenous Tourism in Canada

An analysis of the Indigenous Tourism Association of Canada's national research results in consistent trends and themes allowing for the identification of recommended opportunities for growth in Canada which also can be very effectively used in Atlantic Canada (at the regional, provincial or at the individual business level) for the design and delivery of programs to focus on the key growth opportunities. The six key opportunities identified in the ITAC research to focus on for growth in Indigenous tourism that are highly relevant for Atlantic Canada are:

1. Focus on product development – this effort is critical to securing greater consumer and travel trade interest. This is not just capital investment, it can also be achieved through training and development programs in leadership and business skills, customer service, tourism industry knowledge, and cultural protocols.
2. Improve competitiveness – improves potential growth in market share and can be achieved through enhanced business development and partnerships with mainstream tourism businesses/associations and network development with industry leaders.
3. Meet consumer demand – focus product development on target market demands such as tourism experiences that are authentic, unique and engaging, and can be paired with other experiences such as wilderness, nature-based soft or hard adventures, food, retail, arts and culture.
4. Deliver business support – builds success and sustainability for Indigenous tourism businesses and local tourism economies through building of support from local communities and establishing strong industry associations with targeted and strategic priority goals.
5. Targeted marketing - increase demand through marketing that raises awareness of Indigenous tourism (provincially or for specific experiences) and converts that interest to purchase and visitation. This marketing needs to be positioned to reach the target market through a) their communication channels and b) at the right stage(s) of their path-to-purchase.
6. Increased collaboration – grow the Indigenous tourism economy by working closely with Indigenous tourism businesses and the mainstream tourism industry. This builds awareness, capacity and mutual support and therefore also builds economic sustainability and resilience.

Regional Recommendations for Atlantic Canada

The following recommendations specifically reflect the research and engagement findings from this study and provide both the 'what' and the 'why'.

Atlantic Region Recommendations for Planning & Activation in 6-12 Months		
	Recommendation	**Why**
1.	**Regional funding and development support agencies should come together to develop a multi-partner, multi-year program to focus specifically on regional priorities identified in this report and to keep the partnership momentum moving forward.** **Key support partners need to be identified in each province and at the regional level to come together in a focused and strategic approach to move key initiatives and recommendations forward. Initial projects would include:** • **Multi-year funding and support application program through a regional SPI program (program already in use elsewhere in Canada)** • **Identifying specific support & partnership needs to grow each provincial Indigenous tourism association** • **Identifying key existing support programs to promote and/or create/upgrade for Indigenous tourism (i.e.: marketing, product development, partnerships, leadership)** • **Supporting regional support and research recommendations listed immediately below.**	This approach is currently being used in Alberta with ISC funding and a program committee of major industry support organizations (Government departments and NGO's) to support strategic recommendations very similar to those listed in this report namely: • Improve access to development funding • Increase the number of market and export-ready Indigenous tourism businesses • Assist with a broad range of support types (through hand-on coaching-advisory services)
2.	**Access to finances and funding is a key form of support requiring further review and research relating to making capital available to Indigenous tourism businesses in an effective manner. This review requires consideration of:** **g. Gap analysis - Types of funding available as compared to types of funding needed/requested** **h. What is the funding for? What does this reveal? (i.e.: operations or development)** **i. Identify most significant barriers in the application process** **j. Need to measure ROI to demonstrate level of impact and to track funding value** **k. Best practices of financing programs for small businesses (based on ROI & impact)** **l. Are there aspects of tourism business development that can be supported by capacity development rather than direct funding support?**	Suppliers indicate that across the region that this is the top form of support needed to grow their business. Also, confusion or uncertainty in accessing financing was the fifth largest challenge indicated by suppliers. Just 13% of support organizations in the region who responded to the survey indicated they offer financial support. Of the over 130 support organizations researched in this study, there are fewer than 25 (or less than 20%) who provide funding support.

3. Across the region, each Indigenous tourism association should identify best practices from this report that are relevant for their organization and focus on activating support programs that assist with: **e. Tourism industry collaboration** **f. B2B partnerships** **g. Indigenous tourism industry research** **h. Delivering support projects and programs (including COVID-19 recovery)**	The suppliers indicated that these are clearly the top programs and efforts they are looking for from their provincial Indigenous tourism support organization. Assistance with B2B partnerships is an important priority as this support is not available from existing support organizations. Absent from this list is marketing and business development because these programs are typically led by provincial agencies already adept at these types of support. Indigenous tourism associations should focus on collaborating with industry on marketing and product development.
4. Develop and deliver a program of community workshops offered to individual communities providing community-based strategic planning education and coaching customized specifically to the needs of each community and their current level of tourism development and understanding of the industry.	Community-based tourism planning helps Indigenous communities better understand tourism as an economic development opportunity and provides a planning process to consider developing and supporting a tourism economy and tourism businesses in their community. The program encourages participants to: 1. Better understand the industry 2. Support a community-based approach a tourism planning process 3. Review and discuss opportunities and challenges 4. Develop positive engagement and support 5. Determine agreed-upon next steps to move the planning process forward.
5. An online Indigenous tourism support hub should be developed and actively managed for the Atlantic region to allow Indigenous businesses to find the support they need (including COVID-19 recovery) and should include a basic eligibility filtering. The spreadsheet supplied in this report should be developed into an online resource searchable based on, for example, location, type of business ownership, type of support needed etc.	There is a significant number of programs and support organizations in the region that each have application and eligibility requirements. Supporting organizations need to promote and target their programs. Businesses need to more easily find various forms of support that is managed and updated by a central managing agency who receives updates on support programs from support agencies and searches for new programs.

Recommendations for Long-Term Support Across the Atlantic Region	
Recommendation	**Why**
1. Support for Indigenous tourism in the region should be focused on a) COVID-19 recovery, b) product development, c) marketing and d) support for provincial Indigenous tourism associations.	These are the priority support categories that suppliers/operators and supporting organizations agreed are top priorities for the region.
2. Product development support needs to specifically focus on increasing the number of market or export-ready Indigenous tourism businesses while recovering from COVID-19.	Both Indigenous tourism suppliers and supporters agree that this is a top one or two-level priority challenge for Indigenous tourism success in the region.
3. A wide range of supports are required by suppliers/operators in Atlantic Canada. Support should be inclusive of all levels and types of tourism business and destination development and not be limited to just two or three primary types of support.	Suppliers indicated that they need many forms of support and did not consistently indicate they needed just two or three types of support. For example, no one form of support was requested by suppliers more than 18% of the suppliers surveyed and there were seven different form of support requested by 7% or more of the respondents.
4. Product development (either new or modified) should focus on outdoor & adventure, and tours & related services (includes cultural workshops/training, packaged tours, info centre/desk, tour operator/tour packages)	These two product types are both a) top recommended development types by Atlantic region senior tourism industry representatives and b) currently have very low existing product inventory in the Atlantic region as compared to national averages of Indigenous tourism product.
5. Indigenous tourism associations in provinces that have established Indigenous organizations (such as tribal councils or multi-agency committees) who also have a specific tourism strategy should collaborate and partner on programs, projects and funding efforts. For example, in Nova Scotia (Mi'kmaw Cultural Tourism Strategy) and in PEI (Mi'kmaq Confederacy of PEI - Indigenous Tourism Roadmap for PEI)	Similar to recommendation #10, this approach allows for significant opportunity to pool resources, align goals and advocate for support with a unified voice. Potential political differences may interfere with this approach however the benefits are significant and the risks of not collaborating include diluted or reduced funding, overlapping and duplicated efforts, and confusion or uncertainty with key stakeholders.
6. Develop and deliver support programs and opportunities to assist with developing mutually beneficial business to business (B2B) partnerships and business to industry relationships. Provincial Indigenous tourism associations have an opportunity to drive these partnership-specific support programs.	Suppliers indicate they feel one of the top five supports needed is assistance with business partnerships however currently support organizations indicate that assistance with developing partnerships is not a support they provide.

7. Indigenous tourism associations and businesses should review potential alignment with Atlantic strategies such as: • The Atlantic Growth Strategy (i.e.: "Build My Tourism Business" site has a button offering 17 additional links for guidance and support for tourism businesses in the region) LINK	**This approach also applies for seeking alignment with provincial organizations and their strategic priorities that frequently list Indigenous tourism or cultural/heritage tourism as a strategic priority.** **Alignment with key plans and strategies provides greatly increased opportunity to receive support either directly or indirectly from those organizations who support those strategies. Helping a support organization reach their goals and objectives directly increases the likelihood of a business or other support agency receiving support or partnership to help their own goals.**
8. Indigenous tourism businesses and tourism associations should include France as a key target market when marketing towards long-haul, international visitors seeking Indigenous experiences	France ranks #4 for volume of inbound travel to Canada. Their average length of stay is 13.0 nights and, on average, spend $1,778 per person per trip (excluding any air travel). 37% of French travellers had an Indigenous experience in the last 3 years, a significant 63% of this market is interested in an Indigenous cultural experience (highest of all international markets). Exploring Indigenous culture is ranked #3 in top activities for French visitors, the highest of any international target market for Atlantic Canada.

Atlantic Region Recommendations Specifically for Building a Provincial Indigenous Tourism Association

Provincial Indigenous tourism associations in Atlantic Canada should follow the key best practices in Canada identified by this report (listed below) to establish a sustainable Indigenous tourism organization however it is critically important to also identify unique opportunities and challenges specific to their province and establish close ties with their provincial destination marketing organization to find mutually beneficial programs, projects and funding partnerships.

An extensive best practices analysis completed in this study of successful Indigenous tourism organizations in Canada identified 13 key components to success for any province to consider. These recommended best practices are based on trends, themes and consistencies amongst Indigenous tourism associations who have a) been established for 20 or more years and/or b) identified over 200 established and operating Indigenous tourism businesses in their province or territory.

1. Develop and deliver extensive marketing programs and activities in partnership with destination marketing organizations to a) guide and support Indigenous businesses in their marketing efforts and b) provide direct to consumer and travel trade promotions and awareness on behalf of market and export ready businesses.
2. Maintain a strong priority for business/product development to reflect marketplace gaps, consumer demands and ability to offer market-ready experiences to consumers; particularly focus on establishing or strengthening market or export readiness for eligible businesses.
3. Create close, established relationships with funding partners through a mutually beneficial partnership to build financial stability and sustainability.
4. Deliver active leadership and advocacy for Indigenous tourism in the tourism industry to build awareness, respect, opportunity for collaboration, strategic alignment, and support.
5. Establish an effective strategic planning process to build and grow an Indigenous tourism organization through engagement, research, funding partnerships and effective organizational governance and operations.
6. Set measurable goals and timelines demonstrating specific targets to achieve through the strategic plan and programs.
7. Create close partnerships with industry organizations with aligned strategies and mandates.
8. Establish and operate a membership (or stakeholder) program that maximizes participation through a) low cost of membership, b) relevant, useful benefits and c) active communication and coordination with members on a regular consistent basis.
9. Maintain visible activity in the mainstream tourism and corporate environment through hosting of events, participation on committees and attendance at industry conferences, marketplaces/ trade shows to build awareness of the organization and identify partnerships and collaborations.
10. Develop a regional approach to business and community support to adapt to regional differences and issues through region-specific programs and regional coordinators.
11. Build organizational adaptability to changes in the political or economic environment to allow the organization to survive changes or threats out of the control of the organization; typically this is achieved with a diverse funding and partnership base and the ability to scale the organization programs and staffing based on available funding and support.
12. Review and develop self-earned revenue streams to help offset project costs or to expand projects (i.e.: events, membership, marketing collateral, direct-to-consumer sales channels).
13. Collaborate with Indigenous community leadership demonstrating understanding that support from community leadership is critical in being able to achieve and sustain success and also to benefit from the existing economic development support programs and administrative systems available to community-owned businesses.

Provincial Priorities within Atlantic Canada

Within the Atlantic region, research and engagement data was analyzed to identify priority areas of focus based on the provincial location of the businesses and supporting organizations.

All of the Atlantic region provinces see limited market/export-ready Indigenous tourism product as a significant challenge and all of them prioritize marketing support & training, and product development training as most important forms of support required. All provinces also see that the focus of their provincial Indigenous tourism association should be on partnerships with tourism industry organizations and establishing relationships with Indigenous businesses & entrepreneurs.

However, beyond those shared challenges and support needs, the following needs, challenges, preferred partnerships and Indigenous tourism association priorities were identified that are a higher priority for Indigenous tourism based on their provincial location as compared to the majority of other Atlantic provinces. Support organizations serving Indigenous tourism businesses within these provinces should ensure that they understand their shared support needs and challenges as well as the unique characteristics of each group's perceptions of their unique support required within their province.

The following province-specific priorities are in addition to the shared priorities and recommendations for the entire Atlantic region listed in this section above.

New Brunswick - Indigenous Tourism Priorities	
Supports Needed	• Product development training • Front-line training
Key Challenges to Address	• Limited leadership and coordinated approach • Collaboration between Indigenous & non-Indigenous businesses and organizations
Partnership Assistance	• Other tourism attractions or experiences • Tourism industry organizations
Focus of provincial Indigenous tourism association	• Deliver support projects and programs for Indigenous tourism • Establish a financially stable organization

Newfoundland & Labrador - Indigenous Tourism Priorities	
Supports Needed	• Marketing support & training • Technical support (legal, financial, H.R. etc.)
Key Challenges to Address	• Confusion in accessing funding and capital investment
Partnership Assistance	• Tour operators/ travel agencies
Focus of provincial Indigenous tourism association	• Deliver support projects and programs for Indigenous tourism • Understand opportunities / challenges of Indigenous tourism (research and engagement)

Nova Scotia - Indigenous Tourism Priorities	
Supports Needed	• Support from tourism industry & political leadership including building leadership and a coordinated approach, product development, and building economic sustainability of the Indigenous tourism industry • Access to financing
Key Challenges to Address	• Limited leadership and coordinated approach • Economic sustainability of Indigenous tourism industry
Partnership Assistance	• Tourism marketing organizations
Focus of provincial Indigenous tourism association	• Protect misuse of art and cultural knowledge in tourism • Understand opportunities / challenges of Indigenous tourism (research and engagement)

Prince Edward Island - Indigenous Tourism Priorities	
Supports Needed	• Marketing support & training • Product development training • Tourism research • Frontline training
Key Challenges to Address	• Challenging market/export readiness standards • Collaboration between Indigenous & non-Indigenous businesses and organizations
Partnership Assistance	• Training & development partners • Other non-tourism partners
Focus of provincial Indigenous tourism association	• Develop understanding and trust with community leadership • Protect misuse of art and cultural knowledge in tourism • Create and follow a strategic plan for the association

Ownership-Based Priorities within Atlantic Canada

Within the Atlantic region, research and engagement data was analyzed to identify recommended areas of focus based on if the business was community or non-community (entrepreneur) owned.

Both community and entrepreneur-owned businesses see lack of market and export-ready products as a significant challenge and are looking for more product development training support.

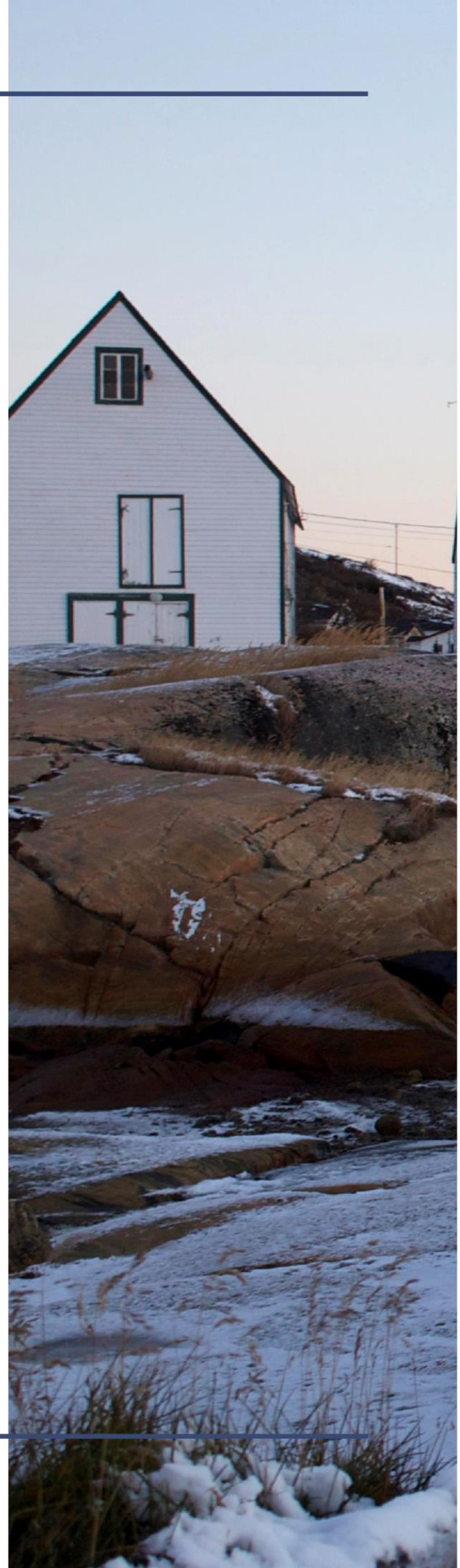
However, needs, challenges and preferred partnerships were identified that are a higher priority for community or entrepreneur (non-community) owned Indigenous tourism businesses. It is recommended that support organizations serving either of these two groups (or both) understand their shared support needs and challenges as well as the unique characteristics of each group's perceptions of their unique support required.

The following ownership-specific priorities for Indigenous tourism businesses in Atlantic Canada are in addition to the shared priorities and recommendations for the entire Atlantic region listed earlier in this section.

Community-Owned Indigenous Tourism Priorities	
Supports Needed	• Community-based training • Access to financing • Support from the tourism industry • Front-line training support
Key Challenges to Address	• Limited partner support • Community support
Partnership Assistance	• Other tourism businesses • Tourism marketing organizations (DMO's, Regional DMO's)

Entrepreneur-Owned Indigenous Tourism Priorities	
Supports Needed	• Increased marketing & marketing training • Product & business development
Key Challenges to Address	• Achieving/maintaining business readiness standards • Marketplace awareness • Workforce shortages
Partnership Assistance	• Travel trade • Indigenous/non-Indigenous businesses & organizations • Training & development partners

APPENDIX



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- YFNCT Corporate Website – Membership webpage - http://yfnct.ca/membership-partners
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Gap Analysis

- Atlantic Canada Agreement on Tourism - https://acat-etra.ca/
- ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018 - https://indigenoustourism.ca/corporate/conference-board-of-canada-research/
- Indigenous Tourism BC Corporate Website: https://www.destinationbc.ca/who-we-are/regional-community-industry-partners/indigenous-tourism/
- Destination Canada - Aboriginal Tourism US Qualitative Research: Summary of Findings and Considerations – 2017 - https://www.destinationcanada.com/en/sectors/indigenous-tourism
- Destination Canada - Aboriginal Tourism US Qualitative Research: Summary of Findings and Considerations – 2017
- ITAC - Canada's Indigenous Tourism Sector Insights & Economic Impacts – 2018

B. Inventory and Review of Supporting Organizations

- Please see attached spreadsheet

C. Engagement Survey

- Atlantic Canada Indigenous Tourism Study - Indigenous Suppliers/Business Operators/Indigenous Community Survey
- Atlantic Canada Indigenous Tourism Study - Supporting Organizations Survey

Joint Economic Development Initiative

Indigenous Services Canada | Services aux Autochtones Canada

Canada

Atlantic Region Indigenous Tourism Project - Indigenous Suppliers/Business Operators/Indigenous Community Survey

This survey is designed to collect information regarding the opportunities and challenges to build, grow and sustain Indigenous tourism in Atlantic Canada. The results of this survey will help determine key next steps and recommendations towards building a successful, authentic Indigenous tourism industry in your province and in the Atlantic region.

BACKGROUND

The goal of the Atlantic Region Indigenous Tourism Project is to develop a report that will clearly lay out opportunities, needs, and available economic development supports for First Nations and Inuit communities seeking to enter or expand in the tourism sector in Atlantic Canada.

The objective is to complete a comprehensive opportunities analysis study with information that can be used by First Nations and Inuit communities, organizations, and entrepreneurs and funding entities to inform a path towards successful economic opportunities, business models, and partnerships within the tourism sector in Atlantic Canada.

The lead organization for the project is Joint Economic Development Initiative (JEDI). The funding agency is Indigenous Services Canada – Atlantic Region.

WHAT IS INDIGENOUS TOURISM?

For this project, and in alignment with the national guidelines for Indigenous tourism that were developed by the Indigenous Tourism Association of Canada (ITAC), we define Indigenous tourism as - all tourism businesses majority owned, operated and/ or controlled by First Nations, Métis or Inuit peoples that can demonstrate a connection and responsibility to the local Indigenous community and traditional territory where the operation resides.

WHO SHOULD FILL OUT THIS SURVEY?

This survey is for anyone involved in Indigenous tourism who wants to assist in providing input and feedback towards improving Indigenous tourism in Atlantic Canada.

This includes:

- Indigenous-owned tourism businesses in Atlantic Canada
- Indigenous community representatives or Indigenous organizational leadership involved in economic development
- Indigenous people in Atlantic Canada interested in becoming active in tourism

HOW WILL THE RESULTS OF THIS SURVEY BE USED?

The results of this survey will help determine next steps and a series of recommendations to be submitted to Indigenous Services Canada - Atlantic Region (the project funder) and to Joint Economic Development Initiative (JEDI - the project lead organization) for their strategic planning processes. The results will also create reference resources for Indigenous tourism businesses and supporters to assist in their efforts to build and support Indigenous tourism in Atlantic Canada.

Contact Details

Name

Type here

Job Title

Type here

Business or Organization Name

Type here

Business Website (if applicable)

Type here

Phone

Email

Business or Home/Office Location

○ Nova Scotia ○ New Brunswick ○ Prince Edward Island ○ Newfoundland & Labrador

○ Other

Business/Organization Location

○ On-Reserve ○ Off-Reserve ○ Not Applicable

Indigenous Community Affiliation - Name of your Nation or home community (if applicable)

Type here

NOTE: If your business or organization is connected in any way to an Indigenous community, please provide us the name of the community.

What type of organization or business do you represent?

○ Indigenous-owned business servicing tourists in any way (minimum 51% Indigenous owned)

○ Representative of an Indigenous community, Indigenous dev. corp. or Indigenous organization/assoc.

○ Indigenous person interested in tourism

○ Other

Indigenous Tourism and Indigenous Community Representative Questions:

These questions are for Indigenous community leadership representatives (ec. Dev. officers, band administrators, dev. corp. managers etc.) and Indigenous tourism suppliers or business operators which includes any individually-owned or community-owned tourism-related businesses active in Atlantic Canada. We also welcome responses from Indigenous people interested in Indigenous tourism in Atlantic Canada.

1. Tourism Business Ownership

○ Community-Owned Tourism Business(es)

○ Entrepreneur-Owned Tourism Business(es)

○ Do not currently operate a tourism business

○ Other

Note: A tourism business includes tourism support businesses such as transportation, retail, events and cultural workshops for visitors. A 'Community-owned' tourism business refers to majority ownership by the community or the community economic development corporation. 'Entrepreneur-Owned' refers to a business that is majority owned by an independent Indigenous entrepreneur(s).

2. Business/Organization Structure

○ Sole proprietorship

○ For-profit corporation

○ Co-operative

○ Partnership

○ Not-for-profit corporation

○ Not yet operating, in development

○ Other

3. What type(s) of tourism product or experience does your business or organization offer on a consistent basis? Please check all that apply.

☐ Accommodations (includes hotels, motels, lodges and campgrounds)

☐ Attractions (includes museums, cultural centres, event venues, casinos and nature viewing areas)

☐ Events & Conferences (includes pow-wows, cultural festivals, conferences and trade shows, traditional feasts, performances, traditional games and rodeos)

☐ Food & Beverage (includes restaurants or cafes, fine dining, fast food and bars/clubs)

☐ Outdoors & Adventure (includes guided wildlife viewing/nature walks, guided fishing and hunting with guide/outfitter, guided trail rides and horseback excursions, boat/canoe/kayak tours, golf courses)

☐ Retail (includes gift store/craft shop/boutique, retail art gallery/artist studio, gas station, grocery store, artists, art/gift vendors)

☐ Tours and Related Services (includes cultural workshops/training, packaged tours, info centre/desk, tour operator/tour packager/travel agency)

☐ Transportation (any form of transportation provided to guests or customers for a fee

☐ Not yet operating, in development

☐

4. Of the tourism products and services offered, which one tourism category generates the largest share of business revenue? Please check only one.

- ○ Accommodations
- ○ Attractions
- ○ Events & Conferences
- ○ Food & Beverage
- ○ Outdoors & Adventure
- ○ Retail
- ○ Tours and Related Services
- ○ Transportation
- ○ Not yet operating, in-development
- ○ Other

5. What is the level of your business readiness? (review each level and select one, if you have more than one business, please use your largest business)

○ IN-DEVELOPMENT - You are not yet 'open for business', OR you are open for business but do not yet meet the Visitor Ready standards (i.e.: do not have set business hours, all necessary licenses & certification etc.)

○ VISITOR-READY - Business is open and operating (year-round or seasonally), you have all applicable business licenses, permits and insurance and you have an established business location with set business hours.

○ MARKET-READY - Business meets the 'Visitor Ready' level AND ALSO provides set pricing, payment options and cancellation policies, have marketing materials such as brochures and business social media accounts, during operating season respond to inquiries within 24-48 hours, can accept reservations by email or telephone, have images/video for promo purposes and have front-line staff trained in customer service standards.

○ EXPORT-READY - Business meets the 'Visitor Ready' and 'Market Ready' levels AND ALSO has been in business for at least one year, have liability insurance (typically $2 million), understand the travel trade system including receptive tour operators, travel wholesalers, retail and online travel agents etc., have pricing levels established for retail, agent commissions and wholesale net rates, have set minimums and cancellation policies for travel trade partners, able to provide travel trade partners with images and descriptions for use in their promotional materials, and provide support for media and travel trade familiarization tours.

Note: These business readiness levels are based on tourism industry standards and Canada's National Indigenous Tourism Guidelines.

6. At your busiest time of year, how many staff does your tourism business employ? For this survey, part-time staff count as one-half.

○ Less than 5 staff ○ 5-10 staff ○ 10-20 staff ○ Over 20 staff

○ Not yet open for business

7. What was your total or 'gross' revenues for your tourism business in 2019?

○ Less than $50,000 ○ $50,000 to $100,000 ○ $100,000 to $250,000 ○ $250,000 to $500,000

○ Over $500,000 ○ Prefer not to disclose ○ Not yet open for business

NOTE: The information you provide will be kept strictly confidential and your identity will be kept anonymous.

8. In 2019, my tourism business ...

○ Made a profit ○ Broke even ○ Had a loss ○ Not yet open for business

9. If you are currently operating a tourism-related business, what is your most successful type of partnership you currently have?

- ○ Tour Operator/ Travel Agencies
- ○ Goods and Services Suppliers (F&B, Wholesalers etc.)
- ○ Tourism Marketing Organizations
- ○ Other non-tourism businesses
- ○ Other tourism attractions/ experiences
- ○ Training and development partners
- ⦿ ________

10. What type of partnership do you most want to create or improve/grow?

- ○ Tour Operator/ Travel Agencies
- ○ Goods and Services Suppliers (F&B, Wholesalers etc.)
- ○ Tourism Marketing Organizations
- ○ Other non-tourism businesses
- ○ Other tourism attractions/ experiences
- ○ Training and development partners
- ⦿ ________

11. For your tourism business, what types of support programs have you used in the past 3 to 5 years? (check all that apply)

- ☐ Marketing and promotions with a Destination Marketing Organization (DMO)
- ☐ Business development program(s)
- ☐ Market and industry research
- ☐ Technical support (IT/website, finance/accounting, legal, human resources)
- ☐ Access to financing, capital, grant funding
- ☐ Advocacy, leadership from support organizations
- ☐ Community-based support programs
- ☐ Tourism service skills training, customer service
- ☐ Management training program(s)
- ☐ None
- ☐ Other

12. From this list, please select the THREE most significant or important Indigenous tourism OPPORTUNITIES in your province that should be a priority to grow Indigenous tourism. (Check only 3 boxes)

- ☐ Product and business development of Indigenous tourism experiences
- ☐ Marketing efforts to increase marketplace demand for Indigenous tourism
- ☐ Support for businesses from the tourism industry i.e.: Industry Associations, DMO's, Provincial Gov't etc.
- ☐ Support for provinces to develop or strengthen an Indigenous tourism association
- ☐ Build and grow partnerships with travel trade/ tour operators i.e.: Online travel agencies, travel media, receptive tour operators etc.
- ☐ Increase or improve/simplify access to business capital and funding to Indigenous tourism businesses
- ☐ Training for standards/guidelines/best practices for Indigenous tourism businesses
- ☐ Effective partnerships with established Indigenous or non-Indigenous tourism businesses i.e.: multi-business offerings to tourists
- ☐ Community-based training and support for Indigenous tourism development and growth
- ☐ Other

13. From this list, please select the THREE most significant Indigenous tourism CHALLENGES in your province that are barriers to growing Indigenous tourism. (check only 3 boxes)

- ☐ Limited partner support (funding, business relationships, advocacy)
- ☐ Limited leadership and coordinated approach supporting Indigenous tourism
- ☐ Low number of Indigenous cultural tourism product that is market/export ready
- ☐ Indigenous tourism operators struggling with market/export readiness standards
- ☐ Low marketplace awareness, limited marketing
- ☐ Confusion or uncertainty in accesses funding and capital investment for Indigenous tourism businesses and communities
- ☐ Shortage of a qualified workforce
- ☐ Lack of community support for, or understanding of, Indigenous tourism
- ☐ Difficult economic sustainability of Indigenous tourism industry
- ☐ Lack of collaboration between Indigenous and non-Indigenous tourism businesses and organizations
- ☐ ______

14. Check the THREE boxes beside the kind of help you feel you most need to start, improve or expand your Indigenous tourism business. (check only 3 boxes)

- ☐ Marketing support and training
- ☐ Product development training, advice, guidance
- ☐ Tourism research, understanding the industry and consumer demand
- ☐ Technical support (IT/website, finance/accounting, legal, human resources)
- ☐ Access to financing to help fund planning and development
- ☐ Business partnerships and cooperation with other operators and organizations
- ☐ Support from my community and my community leadership
- ☐ Support from tourism industry and political leadership
- ☐ Tourism front-line service skills training and HR support
- ☐ Business management or leadership training
- ☐ ______

NOTE: If you or your organization do not currently operate a business, please respond to this question in terms of what you expect or feel Indigenous tourism businesses need.

15. Check the THREE boxes beside what you feel are the most important issues to establish or grow a successful Indigenous tourism organization in your province? (check only 3 boxes)

- ☐ Clearly understand the opportunities and challenges of Indigenous tourism
- ☐ Create and follow a strategic plan for the association
- ☐ Build a close relationship with the Indigenous businesses and entrepreneurs
- ☐ Create close partnerships within the tourism industry and with other supporting organizations
- ☐ Agree on key goals and objectives for the association
- ☐ Have Indigenous tourism champions as leaders of the new organization
- ☐ As quickly as possible, begin support projects and programs for Indigenous tourism
- ☐ Develop policies and programs to protect misuse of art and cultural knowledge in tourism
- ☐ Establish a financially stable organization
- ☐ Develop understanding and trust with community leadership
- ☐ __________

16. Looking ahead to the next 6-12 months, what are your THREE most significant challenges due to COVID-19 and its impact on your business or your communities' businesses (check only 3 boxes)

- ☐ Reduced number of tourists in the region
- ☐ Restrictions on business operations (i.e.: capacity, activities allowed)
- ☐ Increased health and safety requirements and costs
- ☐ Labour, difficulty in finding staff
- ☐ Changing my business to attract different tourists (i.e.: target local instead of international)
- ☐ Understanding the impact of COVID, new trends and research
- ☐ No cash or finances available after first half of 2020
- ☐ Finding and understanding eligible support programs
- ☐ Lost or uncertain business partnerships
- ☐ __________

17. Separate from COVID-19, what do you believe is the top priority to be addressed to build and grow Indigenous tourism in your province?

18. What are one or two ways this priority should be addressed?

19. Specific to COVID-19, what kind of help do you need most?

20. What are one or two ways this priority should be addressed?

I approve that the responses I am providing will be shared with the project funder, Indigenous Services Canada-ISC, and the project lead organization, Joint Economic Development Initiative-JEDI. Research reports produced based on these responses provided will only be shared as aggregated data and not shared based on individual respondents.

⦿ Yes ○ No

On behalf of the Joint Economic Development Initiative and the Project Steering Committee, we would like to thank you for providing information for this study.

If you have any question, please reach out to Many Chief Consulting Ltd. at info@ManyChief.com

Joint Economic Development Initiative

Indigenous Services Canada Services aux Autochtones Canada Canadä

Joint Economic Development Initiative

Indigenous Services Canada / Services aux Autochtones Canada

Canada

Atlantic Region Indigenous Tourism Project - Supporting Organizations Survey

This survey is designed to collect information regarding the opportunities and challenges to build, grow and sustain Indigenous tourism in Atlantic Canada. The results of this survey will help determine key next steps and recommendations towards building a successful, authentic Indigenous tourism industry in your province and in the Atlantic region.

BACKGROUND

The goal of the Atlantic Region Indigenous Tourism Project is to develop a report that will clearly lay out opportunities, needs, and available economic development supports for First Nations and Inuit communities seeking to enter or expand in the tourism sector in Atlantic Canada.

The objective is to complete a comprehensive opportunities analysis study with information that can be used by First Nations and Inuit communities, organizations, and entrepreneurs and funding entities to inform a path towards successful economic opportunities, business models, and partnerships within the tourism sector in Atlantic Canada.

The lead organization for the project is Joint Economic Development Initiative (JEDI). The funding agency is Indigenous Services Canada – Atlantic Region.

WHAT IS INDIGENOUS TOURISM?

For this project, and in alignment with the national guidelines for Indigenous tourism that were developed by the Indigenous Tourism Association of Canada (ITAC), we define Indigenous tourism as: all tourism businesses majority owned, operated and/ or controlled by First Nations, Métis or Inuit peoples that can demonstrate a connection and responsibility to the local Indigenous community and traditional territory where the operation resides.

WHO SHOULD FILL OUT THIS SURVEY?

This survey is for anyone involved in supporting Indigenous tourism and wants to assist in providing input and feedback towards improving Indigenous tourism in Atlantic Canada.

This includes all organizations or people in Atlantic Canada who support, partner or help build Indigenous tourism in Atlantic Canada.

HOW WILL THE RESULTS OF THIS SURVEY BE USED?

The results of this survey will help determine next steps and a series of recommendations to be submitted to Indigenous Services Canada - Atlantic Region (the project funder) and to Joint Economic Development Initiative (the project lead organization) for their strategic planning processes. The results will also create reference resources for Indigenous tourism businesses and supporters to assist in their efforts to build and support Indigenous tourism in Atlantic Canada.

Contact Details

Name

Type here

Job Title

Type here

Business or Organization Name

Type here

Business Website (if applicable)

Type here

Phone

Email

Business or Home/Office Location

○ Nova Scotia ○ New Brunswick ○ Prince Edward Island ○ Newfoundland & Labrador

○ Other

Supporting Organizations Questions:

A supporting organization would include government & non-government organizations, associations or businesses who offer marketing and business development support, advocacy, training, expertise and/or access to capital to clients who include Indigenous tourism businesses in Atlantic Canada.

1. Who is your primary or target customer or client for your organization's support programs?

○ Indigenous-owned businesses and organizations

○ Tourism businesses and organizations

○ All types businesses and organizations in my province/region

○ Other

2. What are the three most important priorities or objectives your organization has identified in its current strategic plan?

Type here

3. From this list, please select the THREE most significant or important overall tourism OPPORTUNITIES in your province that should be a priority to grow tourism in general. (check only 3 boxes)

☐ Product and business development of tourism experiences

☐ Marketing efforts to increase marketplace demand for tourism experiences

☐ Support for businesses from the tourism industry i.e.: Industry Associations, DMO's, Provincial Gov't etc.

☐ Build and grow partnerships with travel trade/ tour operators i.e.: Online travel agencies, travel media, receptive tour operators etc.

☐ Training for standards/guidelines/best practices for tourism businesses

☐ Effective partnerships between established tourism businesses i.e.: multi-business offerings to tourists

☐ Training and support for tourism development and growth

☐ Support for regional or municipal-based tourism organizations

☐ ______

4. From this list, please select the THREE most significant or important Indigenous tourism OPPORTUNITIES in your province that should be a priority to grow Indigenous tourism. (check only 3 boxes)

☐ Product and business development of Indigenous tourism experiences

☐ Marketing efforts to increase marketplace demand for Indigenous tourism

☐ Support for businesses from the tourism industry i.e.: Industry Associations, DMO's, Provincial Gov't etc.

☐ Support for provinces to develop or strengthen an Indigenous tourism association

☐ Build and grow partnerships with travel trade/ tour operators i.e.: Online travel agencies, travel media, receptive tour operators etc.

☐ Training for standards/guidelines/best practices for Indigenous tourism businesses

☐ Effective partnerships between established tourism businesses (Indigenous or non-Indigenous) i.e.: multi-business offerings to tourists

☐ Community-based training and support for Indigenous tourism development and growth

☐ ______

5. From this list, please select the THREE most significant overall tourism CHALLENGES in your province that are barriers to tourism success in general. (check only 3 boxes)

☐ Limited partner support (funding, business relationships, research)

☐ Limited leadership and coordinated approach supporting tourism industry

☐ Low number of tourism product that is market/export ready

☐ Tourism operators struggling with market/export readiness standards

☐ Low marketplace awareness, limited marketing

☐ Shortage of a qualified workforce

☐ Confusion or uncertainty in accessing funding and capital investment for tourism businesses

☐ Lack of community or public support for, or understanding of, tourism

☐ Difficult economic sustainability of tourism businesses

☐ Lack of collaboration between tourism businesses and organizations

☐ ______

6. From this list, please select the THREE most significant Indigenous tourism CHALLENGES in your province that are barriers to Indigenous tourism success. (check only 3 boxes)

☐ Limited partner support (funding, business relationships, research)

☐ Limited leadership and coordinated approach supporting Indigenous tourism

☐ Low number of Indigenous cultural tourism product that is market/export ready

☐ Indigenous tourism operators struggling with market/export readiness standards

☐ Low marketplace awareness, limited marketing

☐ Confusion or uncertainty in accessing funding and capital investment for Indigenous tourism businesses and communities

☐ Shortage of a qualified workforce

☐ Lack of community support for, or understanding of, Indigenous tourism

☐ Difficult economic sustainability of Indigenous tourism industry

☐ Lack of collaboration between Indigenous and non-Indigenous tourism businesses and organizations

☐

7. Check the THREE boxes beside the kind of help you feel all tourism businesses need to improve or expand their business. (check only 3 boxes)

☐ Marketing support and training

☐ Product development training, advice, guidance

☐ Tourism research, understanding the demand

☐ Technical support (IT/website, finance/accounting, legal, human resources)

☐ Access to financing to help fund planning and development

☐ Business partnerships and cooperation with other operators and organizations

☐ Advocacy, leadership and engagement with industry and political leadership

☐ Tourism service skills training

☐

8. Check the THREE boxes beside the kind of help you feel Indigenous tourism businesses need to improve or expand their business. (check only 3 boxes)

☐ Marketing support and training

☐ Product development training, advice, guidance

☐ Indigenous tourism research, understanding the demand

☐ Technical support (IT/website, finance/accounting, legal, human resources)

☐ Access to financing to help fund planning and development

☐ Business partnerships and cooperation with other operators and organizations

☐ Advocacy, leadership and engagement with industry and political leadership

☐ Tourism service skills training

☐

9. What kind of help does your business or organization provide to help build or grow Indigenous tourism? (check all that apply)

☐ Marketing support and training

☐ Product development training, advice, guidance

☐ Tourism research and industry expertise

☐ Technical support (IT/website, finance/accounting, legal, human resources)

☐ Access to financing to help fund planning and development

☐ Advocacy, leadership and engagement with industry and political leadership

☐ Tourism service skills training

☐

10. What one type of help that you offer is the primary focus for your organization? (check only 1 box)

○ Marketing and promotions

○ Business development program(s)

○ Market and industry research

○ Technical support (IT/website, finance/accounting, legal, human resources)

○ Access to financing, capital, grant funding

○ Advocacy, and industry leadership

○ Tourism service skills training, customer service

○ Management training program(s)

○ Community-based support programs

⦿

11. From your perspective and understanding of consumer demand trends, what types of Indigenous tourism product or experience development should be prioritized over the next 3 to 5 years? (Please check all that apply)

☐ Accommodations

☐ Attractions

☐ Events & Conferences

☐ Food & Beverage

☐ Outdoors & Adventure

☐ Retail

☐ Tours and Related Services

☐ Transportation

☐

12. From your industry experience and perspective, what TWO types of partnerships do you feel should be prioritized by Indigenous tourism businesses? (please check only 2 boxes)

☐ Tour Operator/ Travel Agencies

☐ Other tourism attractions/ experiences

☐ Tourism Marketing Organizations

☐ Training and development partners

☐ Other non-tourism businesses

☐ Goods and Services Suppliers (F&B, Wholesalers etc.)

☐

13. Please list 2 or 3 of your specific COVID-19 support programs or activities from your organization you feel are most beneficial for Indigenous tourism businesses? Please provide a link to the programs if possible.

Type here

14. Please list 2 or 3 of your regular support programs or activities from your organization (not in response to COVID-19 challenges) you feel are most beneficial for Indigenous tourism businesses? Please provide a link to the programs if possible.

Type here

15. Separate from COVID-19, what do you believe is the top priority to be addressed to build and grow Indigenous tourism in your province?

Type here

16. What are one or two ways this priority should be addressed?

Type here

17. Specific to COVID-19, what do you believe is the top priority to be addressed?

Type here

18. What are one or two ways this priority should be addressed?

Type here

I approve that the responses I am providing will be shared with the project funder, Indigenous Services Canada-ISC, and the project lead organization, Joint Economic Development Initiative-JEDI. Research reports produced based on these responses provided will only be shared as aggregated data and not shared based on individual respondents.

○ Yes ⊙ No

On behalf of the Joint Economic Development Initiative and the Project Steering Committee, we would like to thank you for providing information for this study.

If you have any questions, please reach out to Many Chief Consulting Ltd. at info@ManyChief.com

Joint Economic Development Initiative

Indigenous Services Canada Services aux Autochtones Canada

Canada