The Conference Board of Canada

Final Report

Canada's Indigenous Tourism Sector: Insights and Economic Impacts

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Executive Summary

This report was commissioned by the Indigenous Tourism Association of Canada (ITAC) to provide a profile and economic impact assessment for Canada's Indigenous tourism sector. The report delivers an updated 2017 direct economic footprint of the Indigenous tourism sector including Gross Domestic Product (GDP), employment, and business growth. In addition, the report provides strategic insights from a national survey of Indigenous businesses that participate in the Indigenous tourism sector in Canada.

At least 1,875 Indigenous businesses participate in Canada's Indigenous tourism sector. In addition, over 39,000 people work in the sector's associated industries. Their combined direct economic footprint in 2017 is estimated to exceed $1.7 billion in GDP. Based on a high-level comparison between our 2017 estimates and ITAC's previous 2014 footprint, it appears that changes to direct employment and GDP in the Indigenous tourism sector have outpaced similar measures of Canadian tourism activity over the same time period.

In this mixed economy we encounter diverse participants including co-operatives and community-owned ventures, incorporated businesses, and a range of sole proprietors, from independent artists to wilderness guides. The variety of participants also includes not-for-profit organizations such as museums owned and operated by Indigenous communities and organizations, cultural festivals, theatre groups, and natural heritage sites. With this diversity, the Indigenous tourism sector presents a unique constellation of values and tourism experiences. On the one hand, our research highlights key economic drivers, such as majority Indigenous-owned air transportation and resort casinos. But our research also reflects the insights of cultural workers, such as Elders, knowledge-keepers, and other providers of authentic cultural experiences, whose activities are more clearly defined in terms of mission and not-for-profit service. Though their economic footprint may be smaller when compared to the larger drivers of economic growth, their presence and voice define many of the authentic Indigenous cultural experiences available to tourists in Canada. Our national survey engaged with these diverse groups in the Indigenous tourism

sector to understand their business characteristics, the audiences and markets they serve, and the supports they need to help nurture and sustain their operations.

In terms of high-level strategic insights to complement our economic findings, survey respondents involved in cultural tourism more frequently called for more Indigenous leadership in shaping regional tourism policies. Aligned with their calls for more Indigenous leadership, they identified issue areas to focus on including enriching tourists' encounters with Indigenous peoples and communities, their traditions, and heritage sites. However, united with their peers in the broader pool of our 2018 survey respondents, operators with a cultural focus also emphasised measures to stimulate further sector growth, including calls for more investments in tourism training and capacity development, and policies to improve access to capital.

Chapter 1: Background

This report, commissioned by the Indigenous Tourism Association of Canada (ITAC), provides a profile and economic impact assessment of the Indigenous tourism sector in Canada. Our findings indicate that at least 1,875 entrepreneurs and organizations participate in Canada's Indigenous tourism sector. In addition, over 39,000 people work in the sector's associated industries. Their direct economic footprint in 2017 is estimated to exceed $1.7 billion in Gross Domestic Product (GDP)[1].

In 2014/15, ITAC commissioned its first comprehensive study of Indigenous tourism in Canada, which also served as a follow up to foundational research conducted in the early 2000s[2]. The study compiled an inventory of over 1,500 businesses operating Indigenous tourism-related ventures; and developed a related survey and economic impact assessment of Canada's Indigenous tourism sector. Building on this formative research, our present report serves to help ITAC continue to monitor the state of Indigenous tourism in Canada.

ITAC's strategic vision for Indigenous tourism encompasses several economic growth targets. These targets, reflected in our economic impact assessment, are broken down by measures of GDP, employment, and business growth in Canada's Indigenous tourism sector. ITAC anticipates that by 2024:[3]

- *The Canadian GDP impact of Indigenous tourism will increase to $2.2 billion;*
- *The Indigenous tourism workforce will increase to 49,383; and*
- *At least 200 Indigenous tourism operators will be export-ready.*

[1] Figure reported in inflation adjusted 2017-dollar terms.
[2] O'Neil Marketing & Consulting, "National Aboriginal Tourism Research Project 2015: Economic Impact of Aboriginal Tourism in Canada."
[3] Indigenous Tourism Association of Canada, "Accelerating Indigenous Tourism Growth in Canada: Five-Year Strategic Plan Update 2019-2024."

The findings of our research and economic impact assessment indicate that Canada's Indigenous tourism sector is well on its way to achieving these goals by 2024. (See Table 1.)

Table 1: Reported progress on key measures towards ITAC's 2024 goals

Measures	2014 estimates	2017 estimates	2024 goals
Direct Employment (Peak Employment)[4]	33.1k	39.0k	49.4k
Direct GDP[5]	\$1.4B	\$1.7B	\$2.2B
Export Ready Businesses	80	133	200

Source: The Conference Board of Canada; O'Neil Marketing & Consulting; Indigenous Tourism Association of Canada.

As we set out to update ITAC's measures of economic performance, our research team worked with ITAC's staff and members to update its business inventory and profile the diverse organizations and entrepreneurs that participate in Canada's Indigenous tourism sector. In this mixed economy we encounter a variety of not-for-profit organizations including heritage sites, museums, cultural festivals, theatre groups, and universities. We also find co-operatives and community-owned ventures, incorporated businesses, and a range of sole proprietors including independent artists and artisans, outfitters, hunters, and wilderness guides. With this diversity, the Indigenous tourism sector therefore includes many unique facets of value creation. On the one hand, we encountered evidence of growth among key contributors to employment and GDP, such as air transportation, resort casinos, and travel services – retail. But in our research, we also encountered Elders, keepers of ceremony and sacred knowledge, and other cultural workers whose activities are more clearly defined in terms of mission and not-for-profit service. Though their economic footprint may be smaller when compared to a casino resort or regional airline, their

[4] The 2015 Report excluded Indigenous tourism businesses in the Northwest Territories

[5] The 2015 Report reported standardized employment estimates as Full-Time Equivalent Jobs and not as Full-Year Jobs. The 2015 Report produced GDP estimates in 2014-dollar terms. The 2018 report estimates these figures using inflation adjusted 2017-dollar terms.

presence and voice define many of the authentic Indigenous cultural experiences available to tourists in Canada. Our national survey engaged with these diverse groups in the Indigenous tourism sector to understand their perspectives on the work they do, the audiences and markets they serve, and the supports they need to help nurture and sustain their operations.

Our discussion of findings is broken down into three chapters. In Chapter 2 we present a profile of the Indigenous tourism sector in Canada. This chapter provides an overview of the sector and serves as a primer for understanding the context of our economic impact assessment in Chapter 3. Our discussion in Chapter 2 walks readers through ITAC's updated business inventory and highlights the market readiness and other key characteristics of its featured businesses, drawing on information from our 2018 survey of Indigenous tourism businesses.

In Chapter 3 we then provide an updated 2017 direct economic footprint of the Indigenous tourism sector that addresses ITAC's key performance measures of GDP, employment, and business growth. Our discussion of the footprint situates our results in the context of ITAC's 2014 estimates and in terms of high-level changes in Canadian tourism activity from 2014 to 2017.

In Chapter 4 we return to our profile of Indigenous tourism businesses to examine strategic insights from our 2018 survey. In responding to our survey, participating Indigenous tourism businesses identified their key markets and ranked local issues for sustainable growth. More than half of our respondents incorporate specific cultural dimensions in their work. Their insights help to identify the needs and challenges of operators who seek to provide authentic Indigenous cultural experiences. More generally, our respondents highlighted opportunities for strategic investment and capacity building to strengthen Indigenous tourism in their regions. Our discussion of these strategic insights integrates the perspectives shared by operators with key findings from our economic impact assessment and review of other supporting data.

Chapter 2: Profile of Canada's Indigenous tourism sector

In this chapter we present a profile of the Indigenous tourism sector in Canada. The profile introduces readers to the diversity of industries and businesses that make up the sector. It provides essential context for understanding the results of our economic impact assessment presented in Chapter 3.

Since the release of its 2014/15 study ITAC has continued to develop an inventory of Indigenous tourism businesses in Canada. To be eligible for inclusion in the inventory, businesses must be majority owned, operated and/or controlled by First Nations, Métis or Inuit peoples, and able to demonstrate a connection and responsibility to the local Indigenous community and traditional territory where the operation resides.

In cooperation with ITAC's staff and members, we spent over three months validating and refining the latest version of the inventory to support our research. Our work at this stage focused on ensuring that included businesses met ITAC's criteria for inclusion, were accurately classified by industry, and had up to date contact information and locational details associated with them. (See Table 2 below.)

We then designed a survey to engage businesses featured in the inventory and used the validated business information to support our outreach and survey deployment strategy. The survey, designed in partnership with ITAC staff, captures facets of the participating businesses' operations, as well as marketing and capacity building dimensions that had not been investigated in ITAC's previous 2014/15 study. (See Chapter 4 for further details.) The survey also integrates relevant questions from ITAC's previous study to support its ongoing efforts to monitor and benchmark the Indigenous tourism sector. Our survey deployment proceeded in two stages by way of a mixed methods sampling strategy. We first applied stratified sampling, followed by sampling to achieve representativeness or comparability, to ensure adequate coverage across regions when collecting basic business characteristics and employment data from respondents. We then applied snowball sampling methods and referrals from ITAC members and relevant industry associations, to ensure that leading Indigenous tourism operators and businesses had an opportunity to contribute their perspectives to the deeper questions our survey posed around growth concerns, cultural tourism, and regional tourism strategies. (See Chapter 4.)

Defining the Indigenous tourism sector

ITAC's current inventory of Indigenous businesses in the tourism sector captures 1,875 business from across 37 industry subsectors and groups. Applying a similar methodology to that used in ITAC's previous study, we organize these industries into subdomains under eight tourism sector domains. The following definitions for each domain also apply conventions and terminology used by Statistics Canada in its 2017 Canadian release of the North American Industry Classification System[6]:

- **Accommodation:** This domain includes establishments primarily engaged in providing short-term lodging to travellers, vacationers and others, in facilities such as hotels, motels, resorts, bed and breakfast accommodations, and so forth.

- **Recreation and Outdoor Activities:** This domain includes outfitters, hunting, fishing, and wilderness guides, as well as various types of recreational and adventure camps, including recreational vehicle parks and campgrounds.

- **Gaming:** This domain includes establishments primarily engaged in operating gambling facilities, such as casinos, bingo halls and video gaming terminals.

- **Food and Beverage:** This domain includes establishments primarily engaged in preparing meals, snacks and beverages, to customer order, for immediate consumption on and off the premises.

- **Arts and Heritage:** The arts side of this domain includes businesses primarily involved in producing, organizing and/or promoting, live events that involve the performances of actors and actresses, singers, dancers, musical groups and artists, athletes and other entertainers. The heritage side of this domain also includes museums, public galleries, public parks, heritage sites, and other establishments primarily engaged in preserving and exhibiting objects, sites and natural wonders of historical, cultural and educational value.

[6] Statistics Canada, "North American Industry Classification System (NAICS) Canada 2017 Version 1.0."

- **Transportation:** This domain includes businesses primarily engaged in transporting passengers and relevant goods for the tourism sector. The modes of transportation are transit and ground passenger, rail, water, and air.

- **Travel Services – Retail:** This domain includes several different general and specialized merchandise stores that provide goods and services to tourists and other travelers. Key examples found in ITAC's business inventory include rural and on-reserve Indigenous owned gasoline stations, duty free shops, and trading posts. It also includes Indigenous owned travel arrangement and reservation services.

- **Other**: This domain includes a diverse cross-section of Indigenous businesses and associations that appeared in ITAC's business inventory but do not fit in the previously defined domains.

Appendix B provides a breakdown of the 37 industries by these high-level domains. Based on their primary business activity, the current total of 1,875 businesses in the inventory were classified in this way, from one of the 37 industries to one of the eight domains. Table 2 below provides a summary of the resulting business classifications by provincial, territorial, and national roll-up.

Table 2: Breakdown of ITAC business inventory by tourism sector domains and region

Region	NL	PEI	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Total	72	20	29	51	217	558	91	90	125	341	82	92	107	1,875
Accommodation	19	-	1	2	58	66	14	12	15	87	11	24	35	344
Arts and Heritage	21	10	14	18	47	125	32	25	62	91	48	9	16	518
Food and Beverage	6	2	3	13	17	77	3	6	5	21	-	1	5	159
Gaming	-	-	1	6	-	9	3	7	5	4	-	-	-	35
Other	2	2	2	1	13	22	5	2	3	16	3	2	2	75
Recreation and Outdoor Adventure	2	1	-	2	47	63	12	12	12	44	9	32	15	251
Transportation	11	1	-	2	7	26	5	3	1	18	3	22	21	120
Travel Services – Retail	11	4	8	7	28	170	17	23	22	60	8	2	13	373

Source: The Conference Board of Canada.

Business structure

Our 2018 survey took a closer look at how the businesses in ITAC's inventory are structured. In response to the survey, 286 Indigenous tourism businesses described how their operations were structured. (See

Table 3.) The majority, (30 per cent), were incorporated for-profit businesses. These for-profit corporations occupied a broad range of industries, though were less frequently found in the Arts and Heritage domain. Next in order of frequency, were sole proprietors (26 per cent), followed by not-for-profit corporations (17 per cent). Sole proprietors constituted a large proportion of the Recreation and Outdoor Activities domain, as well as Arts and Heritage. For their part, not-for-profits were found mainly in Arts and Heritage, but also served as the primary structure for responding businesses in the Gaming domain (such as casinos). Next in order of frequency, 10 per cent of respondents identified their business with an Indigenous owned structure, a category that includes Indigenous government operations, community-controlled social enterprise, and arms length Indigenous economic development corporations. In terms of registered businesses, the remaining pool of respondents belonged either to partnerships (10 per cent) or co-operatives (2 per cent). Co-operatives were primarily found across Inuit Nunangat, in Nunavut, the Inuvialuit region of NWT, and Nunavik - Northern Quebec. Lastly, 5 per cent of respondents indicated they were operating as an unregistered business.

Table 3: Tourism sector domains by relative frequency of business structure, 2018 Survey of Indigenous Tourism Businesses

	Accommodation	Arts and Heritage	Food and Beverage	Gaming	Other	Recreation and Outdoor Adventure	Transportation	Travel Services – Retail	Grand Total
For-profit corp.	42%	10%	27%	33%	53%	38%	41%	28%	30%
Sole proprietor	22%	28%	27%	0%	9%	35%	29%	31%	26%
Not-for-profit corp.	5%	34%	9%	50%	16%	8%	6%	13%	17%
Indigenous owned	8%	15%	18%	0%	13%	5%	12%	3%	10%
Partner-ship	12%	7%	0%	17%	3%	15%	0%	22%	10%
Un-registered	5%	6%	18%	0%	6%	0%	6%	0%	5%
Co-op	5%	1%	0%	0%	0%	0%	6%	3%	2%
Total	59	89	11	6	32	40	17	32	286

Source: The Conference Board of Canada.

Market readiness

Another important facet of our work with ITAC staff was to classify the businesses in its updated inventory by market readiness. In this case, we applied ITAC's four stage definition of market readiness using the following characteristics, developed by ITAC staff, as our guide:

- **Doors Open**: Tourism-related services and experiences appear to be available; but they are not clearly explained and may be on-demand only. The establishment has no dedicated website, lacks defined hours of operation, and may be on-call only, etc.

- **Visitor Ready**: Available information confirms that a business entity exists with a basic website listing, but not much more information is available in terms of product or service details. Visitor ready businesses make only limited efforts to market their products and services, and it is unclear what visitors can expect to see or do.

- **Market Ready**: Available information confirms the business is at least two years old with a dedicated website that provides contact information for key representatives who may be reachable 24/7. Market ready businesses provide promotional materials that clearly explain what visitors will see or do and/or receive in return for purchasing a service or product. Where relevant these businesses also demonstrate that permits/insurance are in place (e.g., for adventures, transport, etc.)

- **Export Ready**: Available information confirms the business is actively involved with industry partners, industry associations, Destination Management Organizations, and the media. Where relevant the business can guarantee bookings and pricing 18 months out. It targets international visitors in its marketing activities; and produces promotional materials with editorial quality images and graphics.

Over a period of four months, we worked through ITAC's inventory using data from environmental scans, guidance from industry associations, and telephone outreach to rate each business. ITAC staff then reviewed our results and provided input based on their knowledge of the Indigenous tourism businesses in the inventory. Seven per cent of the 1,875 businesses in the inventory were found to be export ready. In comparison, 34 per cent were found to be market ready, 31 per cent were found to be at the stage of doors open, and 28 per cent were found to be visitor ready. Table 4 summarizes the results of the classification exercise by tourism sector domain.

Table 4: Tourism sector domains by market readiness classification of associated businesses, 2018 Survey of Indigenous Tourism Businesses

	Doors open	Visitor ready	Market ready	Export ready	Total
Accommodation	26%	20%	43%	11%	344
Arts and Heritage	25%	36%	34%	4%	518
Food and Beverage	47%	23%	28%	2%	159
Gaming	17%	9%	54%	20%	35
Other	32%	36%	25%	7%	75
Recreation and Outdoor Adventure	23%	24%	43%	9%	251
Transportation	31%	18%	34%	18%	120
Travel Services – Retail	42%	32%	22%	4%	373
Grand Total	31%	28%	34%	7%	1,875

Source: The Conference Board of Canada. Note: Reported results are rounded to nearest integer

From the perspective shown in Table 4, domains such as Gaming had the highest proportions of export ready and market ready businesses (74 per cent combined), followed by Recreation and Outdoor Adventure, Accommodation, and Transportation. In comparison, Travel Services – Retail, Food and Beverage, and Arts and Heritage had the lowest proportions of market and export ready tourism businesses. Businesses in the Travel Services – Retail domain provide essential services to visitors and tourists and are most typically represented in the inventory by rural and on-reserve gas stations and convenience stores. While essential travel services, over 40 per cent of these establishments where "Doors open" and did not present any clear evidence of having a specific marketing strategy for visitors and tourists. We observed a similar pattern for businesses in the Food and Beverage domain where the proportion of "Doors open" was higher at 47 per cent. In Arts and Heritage, a substantial population of artists, artisans, and other cultural workers provide goods and services to visitors, but at least a quarter do not appear to be actively promoting themselves through personal websites, social media or other available online marketing channels readily accessible to tourists (via Indigenous and rural business listings, associations, etc.).

Chapter 3: Direct economic impact of Canada's Indigenous tourism sector

The first step in establishing the direct footprint of the Indigenous tourism sector in Canada was determining the employment levels in the eight tourism sector domains by province and territory. This process involved using, where possible, responses to the 2018 survey from Indigenous tourism businesses. These "donor" responses were used to derive estimates of the average employment level for Indigenous businesses that did not respond to the survey, by province and by the specific 37 industry classifications that were used to define the tourism sector.[7]

The survey responses were also used to estimate the contribution of seasonal employment to overall employment. The estimated share of seasonal employment was then used to convert the overall levels of employment into full-year equivalent positions.[8] This process is required because Statistics Canada's input-output multipliers can convert estimates of employment into labour income, business revenues, and GDP only if employment is measured in terms of full-year equivalent positions.

Quantifying Canada's Indigenous tourism sector in 2017

Integrating the results of the 2018 survey along with the imputed employment estimates suggests that the Indigenous tourism sector in Canada employed just over 39,000 individuals in 2017. By considering the share of employment that was seasonal, this level of employment supported the equivalent of just under 31,500 full-year jobs. (See Table 5.)

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[7] The average business size derived from using Statistics Canada's Business Register (2017), and for majority Indigenous population areas, was also used as a reference.

[8] It was assumed that seasonal employment involved an average of 5 months employment and hence each seasonal position counted as 5/12 of a full-year equivalent position.

Of the 39,000 individuals working in the Indigenous tourism sector in 2017, just over half (51%) worked in Ontario or British Columbia. At the same time, employment in the territories amounted to under 4,400 individuals or 11 per cent of the total employment in Canada's Indigenous tourism sector. (See Table 6.) The reader is advised to refer to Appendix C to see further details regarding the specific direct economic impacts associated with the Indigenous tourism sector.

Using the full-year employment estimates of the Indigenous tourism sector as a guide, it is possible to determine the labour income, business revenues, and GDP that correspond with that level of employment. In order to do this, the analysis involved the use of distinct provincial and territorial direct input-output multipliers that correspond to each of the 37 industry classifications that define the tourism sector. As opposed to many traditional input-output model simulations where the level of spending (or industry output) is used to initiate the analysis, in this instance one key component of the economic footprint (employment) was already known. Hence, in this respect the analysis worked "backwards" to determine the labour income, business revenues, and GDP that correspond with the direct employment footprint associated with the sector.

Table 5: Employment in the Indigenous tourism sector (2017), by domain

Domains	Employment (Jobs)	Employment (Full-Year Jobs)
Accommodation	5,447	4,581
Recreation and Outdoor Activities	7,388	4,715
Gaming	5,567	4,782
Food and Beverage	3,945	3,401
Arts and Heritage	4,496	3,022
Transportation	4,834	4,544
Travel Services – Retail	6,017	5,272
Other	1,342	1,122
Total Tourism Sector	**39,036**	**31,439**

Source: The Conference Board of Canada.

Table 6: Employment in the Indigenous tourism sector (2017), by province/territory

Province/Territory	Employment (Jobs)	Employment (Full-Year Jobs)
Newfoundland & Labrador	1,004	783
Prince Edward Island	187	146
Nova Scotia	876	795
New Brunswick	829	692
Quebec	4,083	3,178
Ontario	12,924	10,750
Manitoba	1,255	1,002
Saskatchewan	3,608	2,984
Alberta	2,939	2,395
British Columbia	6,957	5,137
Yukon	974	758
Northwest Territories	1,675	1,358
Nunavut	1,727	1,459
Total Tourism Sector	**39,036**	**31,439**

Source: The Conference Board of Canada.

Based on the analysis, it is estimated that the total labour income corresponding with the nearly 31,500 full-year jobs in the Indigenous tourism sector amounted to $1.14 billion and helped contribute over $1.7 billion in direct GDP for Canada in 2017. These direct economic impacts were possible due to the estimated revenues of Indigenous tourism businesses and self-employed individuals that amounted to nearly $3.8 billion. (See Table 7.)

Table 7: Direct economic footprint of the Indigenous tourism sector ($-millions, 2017), by domain

Domains	Labour Income	GDP (Basic Prices)	Revenues (Industry Output)
Accommodation	158.1	251.5	455.0
Recreation & Outdoor Activities	117.1	184.8	330.2
Gaming	189.0	240.6	605.6
Food & Beverage	71.8	84.9	191.7
Arts & Heritage	89.2	117.9	213.3
Transportation	317.7	496.3	1,398.8
Travel Services – Retail	150.9	301.7	470.7
Other	45.9	65.0	128.2
Total Tourism Sector	**1,139.8**	**1,742.6**	**3,793.5**

Source: The Conference Board of Canada.

While Ontario and British Columbia accounted for the largest proportional shares of the direct economic footprint associated with the Indigenous tourism sector, collectively, the territories represented between 16-17 per cent of the direct economic footprint of Canada's Indigenous tourism sector, depending on the specific measure referenced. (See Table 8.)

Table 8: Direct economic footprint of the Indigenous tourism sector ($-millions, 2017), by province/territory

Province/Territory	Labour Income	GDP (Basic Prices)	Revenues
Newfoundland & Labrador	33.4	47.6	95.2
Prince Edward Island	2.8	4.2	7.2
Nova Scotia	23.0	31.6	51.4
New Brunswick	16.5	24.3	71.3
Quebec	99.1	156.0	297.6
Ontario	382.6	622.1	1,368.3
Manitoba	30.2	41.7	94.1
Saskatchewan	98.4	116.7	252.9
Alberta	108.8	166.2	387.7
British Columbia	167.4	260.3	524.2
Yukon	24.3	35.2	83.5
Northwest Territories	59.6	102.9	262.1
Nunavut	93.7	133.8	297.8
Total Tourism Sector	**1,139.8**	**1,742.6**	**3,793.5**

Source: The Conference Board of Canada.

It should be noted that the direct economic impact measures (labour income, GDP and revenues) were produced using the most recent (2014) provincial and territorial multipliers available from Statistics Canada. The resulting estimates were then inflation adjusted to reflect the valuation of these measures in 2017 using average consumer price inflation between 2014-2017 from the Conference Board of Canada's electronic database.

In order to ensure the analysis reflects the fact that Indigenous businesses likely employ a higher share of Indigenous workers than non-Indigenous businesses, the specific valuations used to determine the direct economic impact measures (labour income, GDP, and revenues) were adjusted to account for any potential differences this factor may have on the overall payroll of businesses due to wage differentials.

Overall, the analysis assumed that Indigenous workers comprised 54 percent of the total workforce of Indigenous businesses.[9] The degree to which Indigenous payrolls differed from non-Indigenous payrolls was determined using various profiles from Statistics Canada's National Household Survey for 2016 that revealed average employment income on an industry basis for full-time work for both Indigenous and non-Indigenous workers.

Comparing the direct economic footprint of Canada's Indigenous tourism sector in 2017 to the previous 2014 estimates

In 2014/15, ITAC commissioned its first comprehensive study of Indigenous tourism in Canada, which found that 1,527 Indigenous owned businesses participated in the tourism sector in Canada during 2014. For the present study, it was found that the number of Indigenous owned businesses operating within the tourism sector had increased to 1,875 during 2017.

In addition to the sheer number of businesses in the updated inventory, the current inventory also differed from the prior inventory in terms of the sectoral composition of Indigenous businesses and their geographic distribution. These changes in the inventory of Indigenous tourism businesses, along with any associated changes affecting respondents' survey responses suggest that making a direct apples-to-apples comparison may be challenging. Despite this, there are some high-level measures that can be loosely compared.

Table 9 below shows some of the high-level measures that came out of the current study along with those that were reported for 2014. On the surface it appears that changes in the direct employment of the tourism sector closely align with the degree to which the overall number of businesses in the inventory changed. However, considering that the new inventory accounts for significantly more activity associated

[9] Canadian Council for Aboriginal Business, "Promise and Prosperity: The 2016 Aboriginal Business Survey.", p. 20.

with two domains in particular, gaming and air transportation, it may not be that surprising to find stronger growth among some of the other direct economic impact measures. Most notably, the overall revenues for the sector is reported to be over 43 per cent higher in 2017 compared to 2014. It should be noted that the three direct economic impact measures (GDP, labour income, and revenues) reported for 2017 are valued using 2017 inflation adjusted terms. Hence valuations between 2014 and 2017 are likely to increase for most of these measures due to increases in overall consumer prices.

Table 9: Comparison of direct economic impact measures for the Indigenous tourism sector (2017)

Measures	2014 estimates	2017 estimates	Change	Change - %
Businesses[10]	1,579	1,875	296	18.7
Direct Employment (Peak Employment)[9]	33,112	39,036	5,924	17.9
Direct Employment (Full-Year Jobs)[9, 11]	26,797	31,439	4,642	17.3
Direct GDP ($-millions)[9, 12]	1,415.0	1,742.6	327.6	23.2
Direct Labour Income ($-millions)[9,11]	870.2	1,139.8	269.5	31.0
Direct Revenues ($-millions)[9, 11]	2,650.7	3,793.5	1,142.8	43.1

Sources: The Conference Board of Canada; O'Neil Marketing & Consulting.

Comparing the progress of Canada's Indigenous tourism sector to overall tourism activity in Canada

Just as assessing how the Indigenous tourism sector has performed between 2014 and 2017 is difficult beyond high-level measures[13], it is difficult to make an in-depth comparison of this performance to that of overall tourism activity in Canada between 2014 and 2017. However, once again and despite these challenges, there are some high-level measures that can be loosely compared.

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[10] 2014 estimates did not account for Indigenous tourism businesses operating in the Northwest Territories.
[11] 2014 estimates reported standardized employment estimates as Full-Time Equivalent Jobs and not Full-Year Jobs.
[12] 2014 estimates for GDP, Wages and Salaries, and Output were reported in 2014-dollar terms, while the current report measures estimates using inflation adjusted 2017-dollar terms.
[13] The challenges raised earlier include differences in the underlying business inventories used and possible changes affecting how businesses responded between the two studies' surveys.

The following table (see Table 10) shows some of the high-level measures that are reported for overall tourism activity in Canada[14]. On the surface it appears that changes to direct employment in the Indigenous tourism sector (as shown in Table 9) significantly outpaced that experienced by tourism activity in Canada. It also appears that the growth in direct GDP and revenues attributed to the Indigenous tourism sector between 2014 and 2017 also significantly outpaced that of overall tourism in Canada.

Caution should be taken when attempting to draw definitive conclusions from this, as the root source of the Indigenous tourism sector footprint has likely undergone more substantive change than the root sources used to report on tourism activity as a whole. However, with the aforementioned caveats taken into consideration, it does appear that (based on the high-level takeaways), the Indigenous tourism sector has increased between 2014 and 2017 and that the pace of its changes may outstrip those of overall tourism activity in Canada.

Table 10: Direct economic impact measures reported for overall tourism activity in Canada

Measures	2014	2017	Change	Change - %
Direct Employment (Full-Year Jobs)	700,300	736,100	35,800	5.1
Direct GDP ($ millions) [15]	36,056	41,7275	5,219	14.5
Direct Revenue (Tourism Activity)[12]	86,483	97,474	10,991	12.7

Sources: The Conference Board of Canada; Statistics Canada, “National Tourism Indicators.” (2014, 2017).

[14] Statistics Canada, “National Tourism Indicators.”

[15] 2014 figures are reported in 2014-dollar terms, while the 2017 figures are reported using inflation adjusted 2017-dollar terms.

Chapter 4: Insights from operators

Our 2018 survey purposively engaged with leading Indigenous tourism operators from across Canada, including ITAC's regional members, to understand the issues and challenges that affect their opportunities for growth. This smaller subset of our total survey response set totalled 286 Indigenous tourism operators (though total N vary depending on the depth of questions engaged with). Cultural tourism is a priority for over 60 per cent of these Indigenous operators, and this context informs the insights they shared with us. Far from simply being growth driven, many of these operators are mission driven to promote local cultures, preserve heritage, and support community economic development. Our discussion in this chapter therefore summarizes insights into some of the unique strategic dimensions of Indigenous tourism in Canada, including the ways operators work with Indigenous communities to deliver authentic tourism experiences.

Issues and challenges for growth

Indigenous operators want to grow and have been growing, as discussed in Chapter 3; but capacity constraints present obstacles for sustained business development. When asked to pick their top two desired supports for business development and growth, our survey respondents most frequently identified access to financing and marketing support and training. This tended to be the case regardless of an operator's business structure, with the exception of our smaller sample of unregistered businesses and co-ops. In this regard, Indigenous tourism businesses share similar concerns to those of other Indigenous and rural small and medium-sized enterprises.[16] (See Table 11.)

[16] The Conference Board of Canada, "Research Module 3: Barriers to Aboriginal Entrepreneurship and Options to Overcome Them."

Table 11: Supports needed by Indigenous tourism businesses, by business structure, 2018 Indigenous Tourism Business Survey (N=216)

	Marketing support and training	Product development, training, advice, guidance	Tourism market research, understanding the demand	Technical support (IT, finance, legal, HR)	Access to financing	Support from tourism industry and political leadership	Tourism service skills training	Other	Total (N)
Unregistered	25%	25%	13%	6%	6%	13%	13%	0%	**8**
Sole proprietor	24%	10%	6%	11%	24%	15%	6%	4%	**62**
Partnership	13%	16%	8%	5%	24%	21%	8%	5%	**21**
For-profit	27%	16%	5%	7%	21%	17%	6%	1%	**54**
Not-for-profit	17%	13%	11%	7%	24%	18%	6%	2%	**43**
Co-op	0%	0%	33%	0%	0%	33%	33%	0%	**2**
Indigenous ownership	20%	20%	10%	2%	24%	10%	8%	8%	**26**
Total	**40%**	**26%**	**15%**	**14%**	**41%**	**30%**	**13%**	**6%**	**216**

Source: The Conference Board of Canada.

In terms of where Indigenous operators are planning to focus their investments over the next three years, we find several common areas including hiring and training staff, and improvements to facilities and other infrastructure. A key distinguishing factor among operators is whether they participate in cultural tourism. Investing in the development of new cultural experiences was the most frequent area of investment for operators who identified as being providers of cultural tourism (N=170).

Developing and marketing authentic cultural experiences

Cultural tourism providers expressed several unique needs associated with their operations. An important consideration for them is ensuring that cultural experiences are authentic and respectful of the communities represented in exchanges with tourists. Regardless of business structure or tourism sector domain, the approach these respondents most frequently raised for developing authentic cultural experiences involved consultations with Elders and other cultural leaders. This was especially the case for sole proprietors and for-profit corporations. In comparison, not-for-profits, Indigenous owned businesses, and co-ops also frequently raised the role of community ownership and related oversight mechanisms such as community advisory committees in shaping their tourism products and services. Several respondents also raised other processes including, family traditions, oversight by a locally mandated cultural centre, and co-management mechanisms through a land claims agreement with federal and provincial partners (See Table 12. Note that respondents were able to pick more than one approach that applied to them.)

Table 12: Approaches to developing authentic cultural experiences by business structure, 2018 Indigenous Tourism Business Survey (N=170)

	Community ownership	Community advisory committee	Consultation with Elders/ Cultural leaders	Community meetings	Order in Council/ Band Council Resolution	Other process	Don't know	Total respondents (N) with a cultural focus
Unregistered	11%	0%	44%	11%	0%	22%	11%	**8**
Sole proprietor	13%	10%	36%	9%	8%	15%	10%	**54**
Partnership	29%	0%	38%	17%	13%	4%	0%	**13**
For-profit	16%	17%	30%	13%	8%	13%	2%	**36**
Not-for-profit	29%	13%	22%	13%	9%	9%	4%	**36**
Co-op	20%	20%	20%	20%	20%	0%	0%	**2**
Indigenous ownership	20%	20%	26%	8%	10%	10%	6%	**21**
Total	**38%**	**25%**	**58%**	**22%**	**17%**	**22%**	**10%**	**170**

Source: The Conference Board of Canada.

Participation in cultural tourism also appears to influence an operator's market orientation. Compared to survey respondents who lacked a cultural focus, those involved in cultural tourism more frequently mentioned tourists from foreign markets as part of their target audience. Aside from being more likely to cater to tourists from outside their province/territory (at 60 per cent versus 50 per cent among respondents without a cultural focus), these operators were more likely to market to visitors from the United States (50 per cent versus 40 per cent), Europe (40 per cent versus 20 per cent), and China (20 per cent versus 10 per cent). Operators with a cultural focus also more frequently expressed several unique challenges compared to other respondents, and which also reflect their more outwardly focused market orientation. For example, operators involved in cultural tourism were more likely to mention a greater need for Indigenous leadership in shaping regional tourism policies. They were also more likely to raise concerns about how tourists interact with, and get an impression of, local Indigenous communities, their traditions, and heritage sites. However, like their peers in the broader pool of survey respondents, operators with a cultural focus also emphasized a need for improved tourism training and capacity development, along with access to capital for making improvements to their facilities.

Calls for regional tourism strategies

Lastly, we asked operators to reflect on policy priorities for Indigenous tourism in their regions. In some respects, their responses may be associated with the markets that Indigenous tourism operators focus on in their region. Table 13 provides a summary of how the subset of 267 Indigenous operators in each province and territory divide their attention between customers from their region, Canada, and other key markets such as the United States, Europe, and China.

Table 13: Marketing focus of Indigenous tourism operators by region, 2018 Indigenous Tourism Business Survey (N=267)

Prov/Terr.	Same Province or Territory	The rest of Canada	United States	Europe	China	Other Asian	Other countries	Total (N)
NL	86%	57%	36%	21%	0%	0%	14%	**14**
PEI	100%	100%	100%	33%	0%	0%	33%	**3**
NS	100%	50%	25%	0%	25%	0%	25%	**4**
NB	100%	50%	75%	50%	25%	0%	0%	**4**
QC	97%	39%	32%	48%	10%	6%	16%	**31**
ON	88%	55%	38%	26%	12%	2%	14%	**42**
MB	91%	74%	39%	26%	13%	9%	22%	**23**
SK	92%	58%	17%	0%	8%	0%	0%	**12**
AB	88%	61%	39%	33%	18%	9%	30%	**33**
BC	92%	75%	53%	39%	18%	8%	16%	**51**
YT	65%	76%	47%	24%	6%	0%	18%	**17**
NT	77%	59%	32%	23%	9%	9%	18%	**22**
NU	73%	45%	27%	27%	18%	18%	27%	**11**
Canada	**88%**	**61%**	**40%**	**30%**	**13%**	**6%**	**18%**	**267**

Source: The Conference Board of Canada.

The leading Indigenous tourism operators who participated in the survey from New Brunswick and PEI for example appear to have a very strong international focus. By comparison, the larger sample of operators from Quebec expressed a relatively strong focus on Europe, while operators represented from BC and Yukon appear to have a relatively strong focus on the United States. These latter impressions for Quebec, BC, and Yukon, appear to resonate with market research recently undertaken by Destination Canada and ITAC.[17]

To tease out regional policy priorities, the survey asked leading operators associated with ITAC to rank a list of 12 policy areas generated in collaboration with ITAC staff. Survey respondents were also given an option to suggest their own priorities if those listed weren't enough. Table 14 below provides a summary of the policy areas ranked first by operators, for each region and rolled up nationally. In cases of ties, the policy areas operators ranked as being equally important are included, as seen for Nova Scotia and Nunavut.

Table 14: Top policy areas prioritized by Indigenous tourism operators by region, 2018 Indigenous Tourism Business Survey (N=214)

Region	CAN	NL	PEI	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU
Indigenous cultural tourism experiences					X							X		
Indigenous leadership for authentic Indigenous tourism industry				X							X			
Indigenous tourism growth strategy				X					X					
Tourism training and capacity development	X	X				X							X	X

[17] Destination Canada, "2019 Market Snapshots: Understanding the Opportunity for Indigenous Tourism Business in Canada."

Understanding tourism - need for education and resource materials			X											
Access to business capital							X	X						
Appreciation from visitors for Indigenous knowledge and traditions														
Growing and maintaining a strong reputation with the tourism industry										X				X
Lack of infrastructure														X
Business planning and start up assistance														
Opportunities for Indigenous youth														X
Other (policy areas identified by the respondents)														

Source: The Conference Board of Canada.

Table 14 presents diverse perspectives from some of the leading operators in each region. But it also summarizes some common concerns shared across Canada, including calls for more tourism training and capacity development to strengthen regional Indigenous tourism. Some regions also appear to face multiple and intersecting policy challenges. Nunavut's operators for example highlighted training, infrastructure, reputation, and opportunities for youth as being equally important for them.

Chapter 5: Conclusion

Based on the high-level measures presented in our impact assessment and research, the Indigenous tourism sector in Canada appears to have substantially increased between 2014 and 2017. From a high-level perspective, this sector growth appears to have outpaced similar measures of Canadian tourism activity overall. If such a pace continues, it will present a strong case for achieving ITAC's 2024 goals.

As we set out to update ITAC's measures of economic performance, our research team worked with ITAC staff to update its business inventory and profile the diverse organizations and entrepreneurs that participate in Canada's Indigenous tourism sector. This mixed economy features a variety of not-for-profit organizations, co-operatives and community-owned ventures, as well as incorporated businesses, and a range of sole proprietors that each contribute to the sector's dynamism and unique constellation of tourism experiences.

On the one hand, we encountered evidence of growth among key contributors to employment and GDP, such as air transportation, resort casinos, and travel services – retail. (See Chapter 3.) But in our research, we also encountered culturally focused operators whose objectives seek balanced growth that also promotes local cultures, preserves heritage, and supports community economic development. (See Chapter 4.) Though their economic footprint may be smaller when compared to the large drivers of GDP growth, these operators provide the authentic Indigenous cultural experiences available to tourists in Canada. Compared to survey respondents who lacked a cultural focus, those involved in cultural tourism more frequently mentioned tourists from foreign markets as part of their target audience. Operators with a cultural focus also raised several unique concerns and aspirations compared to other respondents, and which also reflect their more outwardly focused market orientation. Operators involved in cultural tourism more frequently recognized a need for more Indigenous leadership in shaping regional tourism policies. Aligned with their calls for more Indigenous leadership, they identified issue areas to focus on including enriching tourists' encounters with local Indigenous communities, their traditions, and heritage sites. However, united with their peers in the broader pool of our 2018 survey respondents, operators with a cultural focus also emphasised measures to stimulate further sector growth, including more investments in tourism training and capacity development, and improving operators' access to capital.

Appendix A

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Appendix B

Mapping of industry groups to Indigenous tourism sector domains

Table 15: Indigenous tourism sector domains and subdomains

Indigenous Tourism Sector Domains	Sub-domains
Recreation and Outdoor Activities	Amusement and recreation industries RV (recreational vehicle) parks, and recreational camps
Accommodations	Traveller accommodation
Gaming	Gambling industries
Food and Beverage	Food services and drinking places
Arts and Heritage	Performing arts, spectator sports and related industries, and heritage institutions
Transportation	Air transportation Automotive equipment rental and leasing Other transit and ground passenger transportation and scenic and sightseeing transportation Rail transportation Support activities for transportation Taxi and limousine service Water transportation
Travel Services-Retail	Gasoline stations General merchandise stores Miscellaneous store retailers Sporting goods, hobby, book and music stores Travel arrangement and reservation services
Other	Advertising, public relations, and related services Aquaculture Clothing and leather and allied product manufacturing Facilities and other support services Food, beverage and tobacco wholesaler-distributors Lessors of real estate Miscellaneous wholesaler-distributors Motion picture and video industries (except exhibition) Other aboriginal government services Other food manufacturing

	Other professional, scientific and technical services Periodical, book and directory publishers Personal and household goods wholesaler-distributors Personal care services and other personal services Professional and similar organizations Rental and leasing services (except automotive equipment) Seafood product preparation and packaging Specialized design services

Source: The Conference Board of Canada.

Appendix C

Detailed direct economic impact results

Table 16: Selected direct economic impact measures

Province	Employment (FY-Jobs)	Labour Income	GDP (Basic Prices)	Output
NL	783	33,396,882	47,586,486	95,243,659
PEI	146	2,761,770	4,204,901	7,187,176
NS	795	23,022,648	31,581,733	51,403,986
NB	692	16,515,395	24,345,633	71,333,669
QC	3,178	99,063,878	156,014,216	297,621,179
ON	10,750	382,569,368	622,079,198	1,368,281,933
MB	1,002	30,220,979	41,729,315	94,133,678
SK	2,984	98,399,894	116,711,232	252,886,369
AB	2,395	108,806,617	166,240,153	387,713,993
BC	5,137	167,412,031	260,274,700	524,159,395
YT	758	24,345,953	35,165,217	83,539,135
NT	1,358	59,576,724	102,891,195	262,143,675
NU	1,459	93,674,023	133,819,648	297,803,588
Canada Total	31,439	1,139,766,162	1,742,643,628	3,793,451,435

Source: The Conference Board of Canada.

Table 17: Direct employment – Atlantic Canada (Jobs)

Province	NL	PEI	NS	NB	Atlantic Canada
Total	1,004	187	876	829	2,897
Accommodation	227	-	91	16	334
Recreation & Outdoor Activities	75	23	5	47	151
Gaming	-	-	-	168	168
Food & Beverage	129	48	72	313	563
Arts & Heritage	122	58	86	117	384
Transportation	279	16	-	31	326
Travel Services – Retail	112	33	602	88	834
Other	59	10	20	48	137

Source: The Conference Board of Canada.

Table 18: Direct employment – Central Canada and Prairies (Jobs)

Province	QC	ON	MB	SK	AB
Total	4,083	12,924	1,255	3,608	2,939
Accommodation	1,011	1,307	194	192	294
Recreation & Outdoor Activities	1,154	1,705	235	296	414
Gaming	-	2,425	168	1,737	500
Food & Beverage	517	1,843	44	276	151
Arts & Heritage	635	1,068	201	608	530
Transportation	229	1,646	146	53	605
Travel Services - Retail	221	2,626	169	432	430
Other	317	305	98	13	14

Source: The Conference Board of Canada.

Table 19: Direct employment – BC/North and Canada Total (Jobs)

Province	BC	YK	NT	NU	Canada
Total	6,957	974	1,675	1,727	39,036
Accommodation	976	216	496	426	5,447
Recreation & Outdoor Activities	2,440	202	430	362	7,388
Gaming	569	-	-	-	5,567
Food & Beverage	487	-	24	40	3,945
Arts & Heritage	741	171	54	104	4,496
Transportation	504	304	517	505	4,834
Travel Services - Retail	946	64	30	266	6,017
Other	293	16	124	23	1,342

Source: The Conference Board of Canada.

Table 20: Direct GDP – Atlantic Canada ($-millions)

Province	NL	PEI	NS	NB	Atlantic Canada
Total	47.6	4.2	31.6	24.3	107.7
Accommodation	13.0	-	4.4	0.5	17.8
Recreation & Outdoor Activities	2.0	0.4	0.1	0.9	3.3
Gaming	-	-	-	10.1	10.1
Food & Beverage	2.8	0.9	1.3	5.4	10.4
Arts & Heritage	2.3	1.2	1.8	1.5	6.8
Transportation	20.5	0.6	-	1.3	22.4
Travel Services - Retail	4.4	1.0	21.9	2.5	29.8

Other	2.7	0.1	2.0	2.2	7.0

Source: The Conference Board of Canada.

Table 21: Direct GDP – Central Canada and Prairies ($-millions)

Province	QC	ON	MB	SK	AB
Total	156.0	622.1	41.7	116.7	166.2
Accommodation	45.0	54.9	5.6	7.5	16.7
Recreation & Outdoor Activities	23.7	41.1	4.3	6.7	11.1
Gaming	-	123.3	3.7	58.8	19.0
Food & Beverage	10.6	39.5	0.8	6.3	3.8
Arts & Heritage	16.5	30.5	6.1	18.7	14.0
Transportation	34.8	164.9	12.2	4.5	75.8
Travel Services - Retail	7.7	151.5	6.2	13.3	24.8
Other	17.8	16.5	2.8	0.9	1.0

Table 22: Direct GDP – BC/North and Canada Total ($-millions)

Province	BC	YK	NT	NU	Canada
Total	260.3	35.2	102.9	133.8	1,742.6
Accommodation	43.2	5.9	25.1	29.8	251.5
Recreation & Outdoor Activities	70.9	4.1	11.7	7.8	184.8
Gaming	25.6	-	-	-	240.6
Food & Beverage	9.2	-	0.9	3.4	84.9
Arts & Heritage	14.5	4.8	2.1	3.8	117.9
Transportation	41.9	17.1	55.8	67.1	496.3
Travel Services - Retail	43.1	2.8	1.6	20.9	301.7
Other	11.8	0.4	5.7	1.0	65.0

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