



INDIGENOUS
TOURISM ASSOCIATION OF CANADA

2023-24 ACTION PLAN

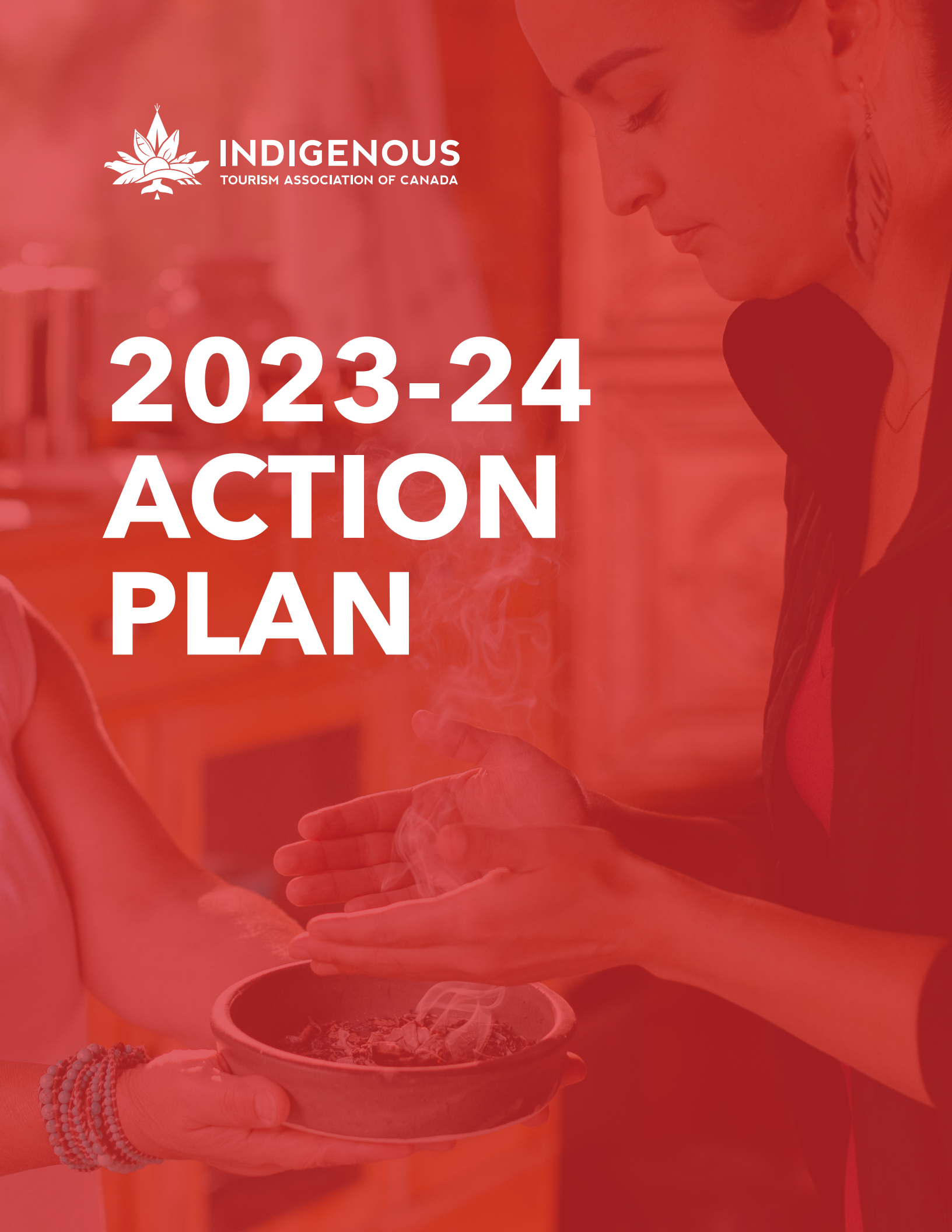


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In this Action Plan, ITAC is proud to feature images of our members from across the country. To learn more about our members and to see more images, please visit **DestinationIndigenous.ca**.

A MESSAGE FROM ITAC'S CEO



***Tansi, Oki, Ada Washde,
Dadanast'ada, Taanishii,
Boozhoo, Aaniin, Hello***

2022 was a year of great growth and continued rebuilding towards our ultimate goal of returning Indigenous tourism to the peaks of GDP and employment seen in 2019. We're actively working everyday towards \$1.9 billion of direct GDP contributions, 1,900 Indigenous tourism businesses and more than 39,000 Indigenous tourism employees by 2025.

Our ambition doesn't end there however, as we have set our sights on becoming the global leader in Indigenous tourism by 2030. Once achieved, we estimate contributing \$6 billion in GDP annually and growing both employment and member numbers across the country.

The resilience of our provincial partners and the growth and success they have experienced this past year, makes those goals, and more, attainable. A big congratulations to Indigenous Destinations Saskatchewan and Indigenous Tourism Manitoba on new associations. And congratulations to Indigenous Tourism Alberta, who saw huge growth in GDP, members and businesses.

ITAC and our provincial tourism partners have achieved strong results. This success would not be possible without the ongoing support of our funding partners and the Government of Canada. National funding streams support provincial tourism leveraging other funds and help contribute to continued growth and success from coast to coast to coast.

We're thrilled to see the return of the International Indigenous Tourism Conference (IITC) in Winnipeg, Manitoba on Treaty 1 Territory and the homeland of the Métis. We're anticipating more than 1000 delegates from around the world to gather for three days of inspiration and learning. ITAC will be joined by leaders, innovators and thought provoking speakers such as The Honourable Murray Sinclair CC, MSC and Chief Executive of New Zealand Māori Tourism, Pania Tyson-Nathan.

Demand for Indigenous tourism experiences continues to grow. There is a shared understanding of the invaluable role Indigenous tourism plays in our economy. Only by working together can we create a sustainable industry that is thriving, a leader nationally and on a global stage. ITAC will continue to advocate for Indigenous tourism and will fight alongside our members to ensure your success.

Thank you to our Board, ITAC team and members across the country for your continued hard work and effort to grow our sector.

Sincerely,

A handwritten signature in black ink, appearing to read 'Keith Henry'.

Keith Henry
President & CEO
Indigenous Tourism Association of Canada

NATIONAL INVESTMENTS IN INDIGENOUS TOURISM SINCE 2014

Annual approximate national investment in Indigenous tourism in Canada has seen an increase of

493% FROM 2014-2022

Annual approximate national investment in 2014 was

\$4.89 MILLION

Annual approximate national investment in 2022 is

\$29 MILLION



The growth in national investments is largely driven by the creation of the Indigenous Tourism Association of Canada, an Indigenous-led, global leader in the marketing and development of Indigenous tourism experiences.



ITAC is a national organization and aligns with Provincial and Territorial Indigenous Tourism Organizations.



ITAC's members are Indigenous-owned and controlled businesses from every province and territory in the country.

A MESSAGE FROM ITAC'S BOARD CHAIR



First I'd like to start by thanking my fellow Directors and the team at ITAC for their hard work to support our members across the country. Your passion, optimism and commitment to ensuring Indigenous tourism thrives, is inspiring and it is an honour to work alongside you.

2022 was a year that saw the Indigenous tourism industry begin to grow again following the previous two years that saw the industry focused on survival. Beyond ensuring our industry continued to exist, ITAC's goals last year were to create a sustainable Indigenous tourism industry in Canada that would not only be able to withstand any future storm, but thrive on a global stage. This past year was the year we began to create the foundation for what will see ITAC be a global leader in Indigenous tourism by 2030, if not sooner.

Our Provincial tourism partners were instrumental in our nationwide success, by strengthening our communication and continuing to grow at impressive rates. I have no doubt that our collective goals are achievable as we continue to work together.

The Board and I, and no doubt all of you, have welcomed the growth we are seeing and though initially clouded by uncertainty in the industry, the sector's path to recovery and renewal has required a series of tailored policy responses that address the vastly different realities of our diverse businesses.

While work still needs to be done to reach the peaks of 2019, we are seeing a steady rise in business. In 2021, over 18,000 people worked in the Indigenous tourism sector and their combined economic footprint was estimated at over \$774 million in GDP. These are modest gains from 2020's catastrophic declines and compared to our 2020 estimates, direct GDP in 2021 increased by \$219 million, while employment increased by over 6,100 jobs.

I applaud our CEO Keith Henry and the ITAC team for its work with our strategic alliances and government partners for helping to create policy and forward-thinking visions that ensure ongoing funding for Indigenous tourism now and in the future.

This coming year is the time for the Indigenous tourism industry to flourish. Our team will continue to bring together all efforts and levels of government to create cohesive solutions for our industry and to support our Indigenous-owned tourism businesses from coast-to-coast-to-coast.

Sincerely,

A handwritten signature in black ink, reading "Marilyn Jensen". The signature is fluid and cursive, with a long horizontal line extending to the right.

Marilyn Jensen
Board Chair
Indigenous Tourism Association of Canada



ABOUT THE INDIGENOUS TOURISM ASSOCIATION OF CANADA

Since 2014, the Indigenous Tourism Association of Canada (ITAC) has strived to support and strengthen Indigenous tourism experiences throughout Canada. ITAC is now widely recognized as the global leader in Indigenous tourism development and marketing. ITAC's reputation is built upon its successes, but also by the strength of its partnerships—at the federal, provincial and territorial levels and also with the Indigenous communities across the country who have chosen to welcome visitors to their lands.

The success of past ITAC strategies has been a result of ITAC's efforts to support member businesses in becoming more market and export-ready and ITAC's building of a network of provincial and territorial partners across Canada. This coordinated approach to development and marketing activities is led by ITAC as the national voice for industry leadership and advocacy.

Over the past seven years, the sector has seen unprecedented growth in Indigenous tourism offerings, resulting in new job creation and an increased contribution to GDP—up from \$1.4 billion to nearly \$2 billion. Additionally, from 2016 to 2019, ITAC supported a 100% increase in the number of market-ready and export-ready Indigenous tourism businesses in Canada. ITAC's strategic recovery plan supports the

sustainable restoration of Indigenous tourism in Canada as the sector leader in annual growth in jobs, GDP contributions and the creation of new tourism businesses.

As the Indigenous tourism industry in Canada recovers from the shock of COVID-19, ITAC has set its sights on moving forward in the most adaptable and sustainable manner possible. ITAC understands that this undertaking will present challenges, both known and unknown, and is prepared to face them head-on. ITAC has forged national partnerships that include Destination Canada, Tourism HR Canada, WestJet, Parks Canada, and the Tourism Industry Association of Canada. The input of these partners is invaluable as ITAC works with them to rebuild the industry in Canada.

ITAC has achieved strong results throughout the COVID-19 pandemic. This success would not have been possible without the ongoing support of our funding partners and the Government of Canada. To achieve our 2022-2025 targets for the Indigenous tourism industry in Canada, ITAC's recovery plan requires a \$65 million investment over three years.



PHOTO: THRIVE TOURS, ON

A GLOBALLY RECOGNIZED INDIGENOUS TOURISM INDUSTRY

2022 saw a continued recovery from the effects of the COVID-19 pandemic. Indigenous tourism and the tourism industry in general, saw a steady increase in growth. ITAC continued to work with national and provincial partners as the nationally recognized voice for Indigenous tourism. This work includes administering the Indigenous Tourism Fund of \$10 Million.

ITAC's newly launched Accreditation Program is well underway, working to recognize Indigenous tourism members as accredited businesses across the country. This program establishes Canadian Indigenous tourism as global leaders. Additionally, ITAC works to further support accredited Indigenous tourism businesses through business development support. ITAC is proud to be seen as a leader among many global nations committed to also growing their Indigenous tourism industries.

Tourism spending in Canada continued to grow for six consecutive quarters, with tourism's GDP contribution and jobs continuing to rise in the third quarter of 2022. While tourism spending remains below 2019 levels, passenger air transport grew 5.8% along with accommodations (2.9%) and food and beverage services (2.4%) in the third quarter. Overall, tourism GDP reached 81% of its pre-pandemic levels in the first three quarters of 2022 according to Stats Canada.ⁱ



PHOTO: TALKING ROCK TOURS, AB

RESEARCH IS ADVANCING WHAT WE KNOW ABOUT OUR VISITORS

Market Research of surveyed Canadians shows

- **86%** have a positive opinion of Indigenous Peoples in their province and in the rest of Canada
- **88%** are interested in participating in at least one Indigenous cultural and tourism activity

Respondents are interested in learning more about Indigenous Peoples

- **75%** are most interested in learning about the history of Indigenous Peoples
- **74%** are most interested in their traditions and heritage

Three main obstacles that could keep respondents from taking part in an Indigenous activity

- **30%** lack awareness of Indigenous tourism opportunities
- **25%** say it is too far to travel to Indigenous experiences
- **25%** lack the time to participate

i. <https://www150.statcan.gc.ca/n1/daily-quotidien/230106/dq230106b-eng.htm>

ii. <https://www.unwto.org/news/tourism-recovery-accelerates-to-reach-65-of-pre-pandemic-levels#:~:text=International%20tourism%20is%20on%20track,the%20same%20period%20in%202021>

iii. <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410036601>

iv. <https://www.eiu.com/n/campaigns/tourism-in-2023/>

Leger Consumer Sentiment Research

International visitors accounted for an 85% increase in visitors in the first three quarters of 2022, suggesting people are increasingly feeling more comfortable travelling and travelling internationally. Overall, international tourism is on track to reach 65% of pre-pandemic levels by the end of 2022. Worldwide, an estimated 700 million tourists travelled internationally between January and September, which is more than double (+133%) the number recorded for the same period in 2021.

Despite growing challenges, export revenues from tourism could reach USD 1.2 to 1.3 trillion in 2022, a 60-70% increase over 2021, or 70-80% of the USD 1.8 trillion recorded in 2019.ⁱⁱ

Tourism employment in Canada saw an increase of 95,800 from Q3 2021 to Q3 2022 while Indigenous employment in accommodations and food and beverage saw an increase of nearly 7000 jobs across the country.ⁱⁱⁱ

The Economic Intelligence predicts global tourism will increase by 30% in 2023, however the economic downturn, Russia's attack on the Ukraine and China's zero-covid strategy will delay a full recovery to pre-pandemic levels.^{iv}

Research from the Conference Board of Canada shows that without new funding, Indigenous tourism would grow at a 6.0 percent annual rate between 2023 and 2030, bringing the direct economic

footprint up to \$2.9 billion in nominal GDP by 2030. And starting from just over 33,600 workers in 2022, the baseline scenario estimates that total employment in Indigenous tourism would reach 43,400 workers by 2030 – about 18 per cent higher than the pre-pandemic workforce. It is ITAC's belief however, that capital investments from the \$1.5 billion Major Projects Fund along with an additional \$250 million in strategic investments provided through the Destination Development Fund, could significantly prop up the sector and generate up to \$1.5 billion in additional GDP for Canada's economy. In addition to the boost in direct GDP, the new funding would also provide a further 18,885 new annual jobs.

ITAC continues to focus on ensuring stability and recovery for the Indigenous tourism economy in 2023 and beyond. Our Build Back Better strategy, coupled with The Original Original accreditation will continue to promote authentic, sustainable and culturally rich Indigenous tourism experiences. We have a strong foundation and strong provincial partners to continue to showcase Canada as a premier Indigenous tourism destination, while continuing to strengthen and grow our membership base in Canada. A strong and resilient Indigenous tourism industry provides opportunities for reconciliation by educating Canadians, provincial, territorial and federal governments and the tourism industry both nationally and globally, on the many benefits of a thriving Indigenous tourism industry.

Leger

ITAC'S 2023-24 PRIORITIES

As the Indigenous tourism industry in Canada continues to recover from COVID-19, ITAC has set priorities that support the recovery and growth of the Indigenous tourism industry. Recognizing that this undertaking will present known and unknown challenges, ITAC is prepared to use proven strategies to secure future funding resources.

ITAC'S THREE MAIN PRIORITIES OF THE 2023-24 ACTION PLAN

- » **Inspiring ITAC member businesses** across the country to rebuild or refocus their business offering through targeted business support, education and training.
- » **Leveraging partnership opportunities and investments** with the Provincial and Territorial Indigenous Tourism Organisations to maintain their membership and infrastructure.
- » **Strengthening ITAC as the national leader and advocate** for Indigenous tourism operators and stabilising funding through the federal government, partners and members.



PHOTO: LEAF RIVER LODGE, QC



2023-24: GROWING INDIGENOUS TOURISM IN CANADA

As ITAC continues to manage the effects of the COVID-19 pandemic, it is shifting its focus to growing Indigenous tourism industry in Canada to reflect the 2019 statistics by 2025. ITAC will ensure that its members have the training and resources they need to rebuild and establish their businesses, products and programs as premier visitor destinations. ITAC will continue to work with partners such as Destination Canada, Parks Canada and provincial and territorial partners on the launch of domestic and international marketing campaigns. Collectively, this work supports the sustainable recovery of the sector and will prepare ITAC's members for renewed promotion to international markets.

Objective: To engage with members to build the Indigenous tourism industry in Canada with a focus on domestic and international travel while continuing to build capacity amongst ITAC's membership, and providing targeted business support where required.

DELIVERABLES

Leadership: Increasing positive industry awareness, advocacy and accountability in order to establish funder confidence and build support for ITAC and its members and ITAC's provincial and territorial Indigenous partners.

Partnerships: Uniting the Indigenous tourism industry in Canada by bringing together members and aligning and leveraging relationships with provinces and territories. Creating national partnerships to support Indigenous tourism.

Development: Working in partnership with provincial and territorial Indigenous tourism associations to encourage member development and to grow investment in Indigenous tourism. Further development of provincial and territorial Indigenous tourism networks.

Marketing: Promoting Indigenous tourism businesses and the positive community and cultural impacts their operations have. Conducting high-value, targeted marketing as well as research, media and sales efforts. Leveraging marketing resources with provincial and territorial organisations to maximise investment and to raise awareness of ITAC as a national and international brand.



PHOTO: FRONTIER LODGE, NWT

LEADERSHIP ACTIVITIES

Advocate for the Indigenous tourism industry at the federal level to ensure continued, easy, and fair access to federal support for operational, project and infrastructure projects

- » Deliver \$10M National tourism funding in partnership with Provincial and Territorial partners
- » Work with Federal Government of Canada to deliver \$10M 'large project' parcel of Indigenous Tourism Fund
- » Receive funding from ISC, ISED to maintain National Association, and Provincial and Territorial Associations

Expand participation and representation in national level tourism organizations

- » Tourism Industry Association of Canada
- » Destination Canada
- » Coalition of Hardest Hit Industries

Host Indigenous Tourism Association of Canada board meetings across Canada

- » Host four meetings
 - May 29, 2023 - Quebec City
 - September 19, 2023 - Halifax
 - December 13, 2023 - Saskatoon
 - February 7, 2024 - TBD

Host Town Hall meetings across the membership

- » Host four meetings
 - West
 - North
 - East
 - Atlantic

Host Annual General Meeting (AGM)

- » Host AGM at Dakota Dunes in Saskatchewan on December 15, 2023

PARTNERSHIP ACTIVITIES

Strengthen and expand federal, provincial, territorial and sector partnerships to support the ongoing recovery of the Indigenous tourism industry

- » Work with Provincial and Territorial Associations and provide \$1.5M in support funding for TOO accreditation and programming (ITBC, ITA, ITM, IDSK, QIT, NLITA, NSITEN, ITAPEI, ITANB, YFNCT and all provinces and territories without an association)

Host an in-person International Indigenous Tourism Conference (IITC) in 2024

- » Host IITC 2024 - location TBD
- » Register 1,000 delegates to attend the conference
- » Raise 25% of total cost of IITC through sponsorship

Grow ITAC membership across Canada

- » Increase membership by 5% in 2023-24

Improve coordination and tracking of ITAC data

- » Implement a CRM system that tracks and provides reporting with data on GDP, employment and membership details for Indigenous Tourism businesses

Complete supply or demand side research as needed to support Indigenous tourism growth

- » Complete one research report with CBOC

Develop and implement corporate communications strategy

- » Deliver 52 e-newsletters to be sent out to inform members, industry and partners about ITAC's achievements to annual plan

DEVELOPMENT ACTIVITIES

Implement ITAC's Accreditation Program and align business supports to improve products and services.

- » Support 300 Indigenous tourism businesses through Accreditation Program process
- » Deliver support to help businesses meet market and export readiness

Engage and Collaborate with Provincial/Territorial Indigenous Tourism Associations

- » Provide \$1.5M for Provincial and Territorial operational and project(s) costs
- » Host four provincial and territorial meetings (2 virtually and 2 in-person)
- » Attend one outreach event in partnership with each established Province and Territory
- » Host two of The Original Original Accreditation program workshops

Process northern business applications through the Accreditation Program

- » 100 businesses assessed through the Accreditation Program

Develop an online directory of tools and training that support business reopening

- » Develop a tool to be implemented in 2024

Launch an Indigenous Tourism Innovation Lab to help future-proof ITAC member businesses

- » Five ICAN members participate in lab to gain financial support for the development and marketing of Indigenous culinary

Work with Parks Canada to develop and implement a tagging program to support artisan authenticity through responsible purchasing and consumer awareness

- » Develop guidelines for retail spaces through a \$25,000 fund from Parks Canada

Host community brand and experience workshops

- » Host workshops in two locations

MARKETING ACTIVITIES

Implement a strategic promotional marketing campaign targeting consumers in key geo-markets in Canada and the US for three flights: spring/summer, fall and winter

- » Increase impressions, reach and leads by 5%

Create points of interest and experiences in marketing and sales channels for key markets

- » Promote 5 regional/thematic itineraries
- » Establish baseline results for impressions, reach, engagement, clicks/leads and conversion

Generate year-round relationship building with Travel Trade Key Accounts and participation in key Trade events and sales missions in Canada and international markets

- » Work with three key markets (USA, Europe, Canada)

Leverage first party data to develop tourism experiences into marketable packages available on websites or to the trade (packages and experiences)

- » Increase the number of Indigenous tourism experiences represented by 10%
- » Increase sales by 30%

Create new content (photography, video, articles, magazines) focused on consumer interests and campaign insights

- » Increase impressions and engagement on our consumer social channels by 5%

Generate year-round outreach and engagement with key media accounts

- » Increase the number and quality of media stories published by 5% in domestic and international markets

Optimise the user experience of DestinationIndigenous.ca and associated websites and social media channels

- » Streamline the customer journey to encourage consumers to purchase member packages and experiences
- » Improve search, navigation, presentation of content and speed
- » Create content in partnership with Parks Canada
- » Consumer website updates, itineraries aligning with themes for marketing, media and sales channels
- » Deliver marketing assets for use by ITAC and northern members for target local/national/international markets

ORGANIZATIONAL CHART

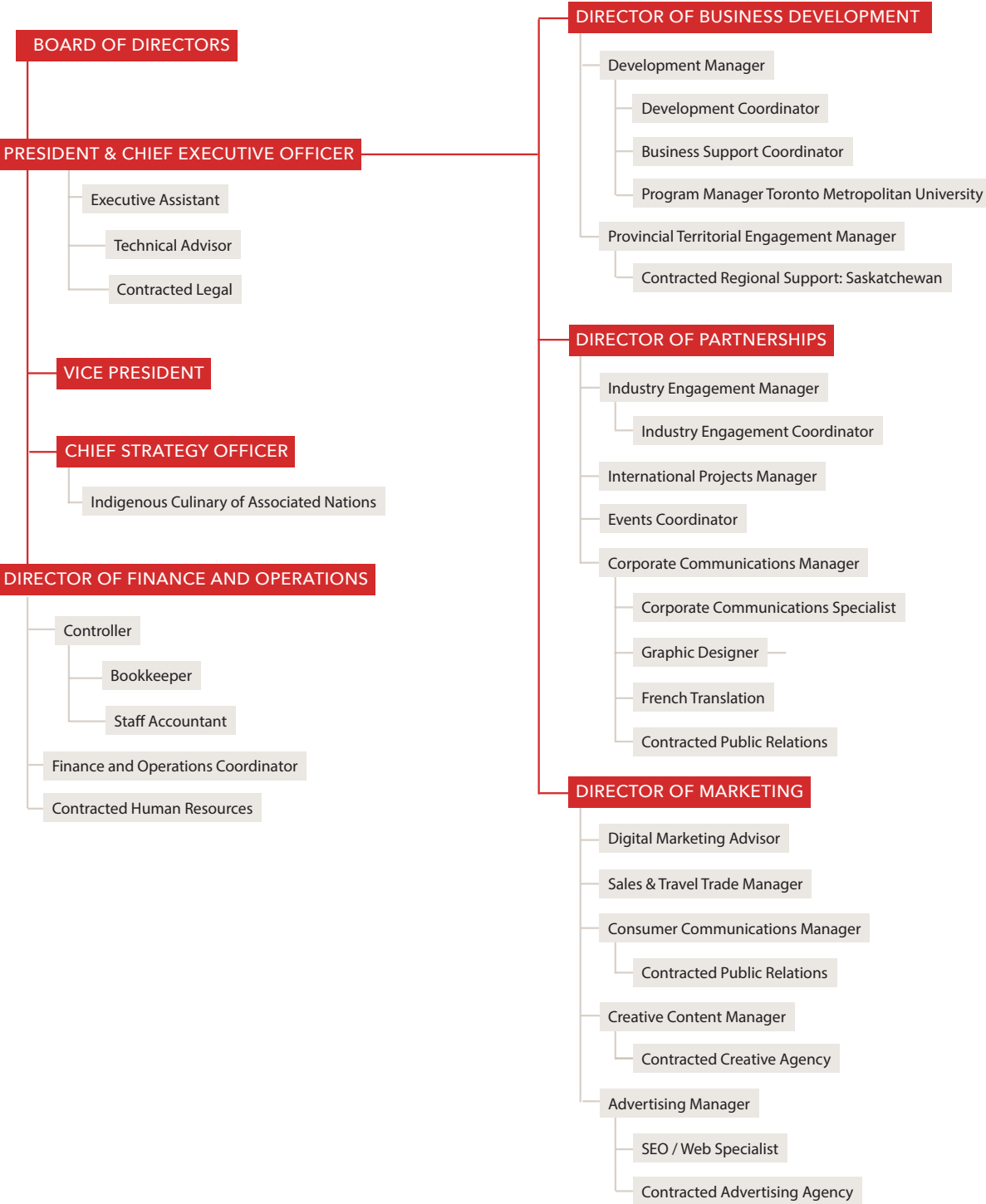


PHOTO: WABANAKI MAPLE, NB

REQUIRED INVESTMENT

REVENUES

Revenue Sources

Indigenous Services Canada	2,400,000
ISED - TRF Project	0
ISED - Indigenous Tourism Fund	10,000,000
Destination Canada	2,200,000
Parks Canada	125,000
Tourism HR Canada	0
Future Skills Centre	474,441
ITAC Memberships	0
Sponsorships	500,000
Registrations, Trade Show, & Marketplace	1,000,000
Other and miscellaneous	250,000
Total Revenues	16,949,441

EXPENSES

Expense Sources

Total Administration	2,713,605
Total Leadership	516,052
Total Partnerships	2,574,183
Total Markteing	2,956,521
Total Development	8,082,923
Total Expenses	16,843,283



INDIGENOUS
TOURISM ASSOCIATION OF CANADA



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DU CANADA

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