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# Canada's Indigenous Tourism Sector.

## Insights and Economic Impacts

REPORT MAY 2019

**Canada's Indigenous Tourism Sector: Insights and Economic Impacts**

Adam Fiser and Greg Hermus

## Preface

This report was commissioned by the Indigenous Tourism Association of Canada (ITAC) to profile and assess the economic impact of Canada's Indigenous tourism sector. The report delivers an updated direct economic footprint of the Indigenous tourism sector in 2017, including GDP, employment, and business growth. In addition, the report provides strategic insights from a 2018 survey of Indigenous businesses that participate in the Indigenous tourism sector in Canada.

Cover image: A stunning Northern light show dancing over Aurora Village, Northwest Territories. Source: Aurora Village.

All photographs courtesy of the Indigenous Tourism Association of Canada (ITAC).

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The team gratefully acknowledges the many entrepreneurs and businesses who shared their perspectives and passion with us. Special thanks to Dené Sinclair for organizing a research review process with regional Indigenous tourism associations, and to the experts and stakeholders who participated.

### Indigenous Tourism Association of Canada (ITAC)

The Indigenous Tourism Association of Canada (ITAC) is a national non-profit and membership association focusing on creating partnerships between associations, organizations, government departments, and industry leaders across Canada to support the growth of Indigenous tourism in Canada.
ITAC publishes an annual experience guide, detailing Indigenous tourism experiences available for visitors across Canada. This year's guide features more than 170 experiences, stories, and businesses to inspire you to visit and learn more about the many Indigenous nations, peoples, and communities across Canada. To download the full *Guide to Indigenous Tourism in Canada 2018/2019*, go to: indigenoustourism.ca/corporate/indigenous-tourism-experience-guide/

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EXECUTIVE SUMMARY

# Canada's Indigenous Tourism Sector: Insights and Economic Impacts

# Key Findings

- At least 1,875 Indigenous businesses participate in Canada's Indigenous tourism sector, and more than 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 gross domestic product (GDP).
- This report delivers an updated 2017 direct economic footprint of the Indigenous tourism sector, including GDP, employment, and business growth. It also provides strategic insights from a national survey of Indigenous businesses that participate in the Indigenous tourism sector in Canada.

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 GDP, employment, and business growth. In addition, the report provides strategic insights from a 2018 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, more than 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.

Previous page: Learning about traditional plants with Mahikan Trails, Alberta.

Source: Mahikan Trails.

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The Indigenous tourism sector presents a unique constellation of values and tourism experiences.

In this mixed economy we encounter diverse participants, including cooperatives 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 with 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.

Flying to the North with Canadian North.

Source: Canadian North.

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 emphasized measures to stimulate further sector growth, including calls for more investments in tourism training and capacity development, and policies to improve access to capital.

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CHAPTER 1

# Background

## Chapter Summary

- This report comprises an update to a study that compiled an inventory of more than 1,500 businesses operating Indigenous tourism-related ventures.
- ITAC's goal is for the Indigenous tourism sector to achieve $2.2 billion in GDP impacts by 2024.
- The findings of our report indicate that Canada's Indigenous tourism sector is on its way to achieving this goal by 2024.

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, more than 39,000 people work in the sector's associated industries. Their direct economic footprint in 2017 is estimated to exceed $1.7 billion in 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 more than 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.

Previous page: Learning traditional porcupine quilting at Lennox Island, Prince Edward Island.

Source: Lennox Island, P.E.I.

1 Figure reported in inflation-adjusted 2017$ terms.

2 O'Neil Marketing & Consulting, *National Aboriginal Tourism Research Project 2015.*

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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;
- at least 200 Indigenous tourism operators will be export-ready.

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

Table 1

**Reported Progress on Key Measures Toward ITAC's 2024 Goals**

| Measures | 2014 estimates | 2017 estimates | 2024 goals |
|---|---|---|---|
| Direct employment—peak employment* (000s) | 33.1 | 39 | 49.4 |
| Direct GDP** ($ billions) | 1.4 | 1.7 | 2.2 |
| Export-ready businesses (number) | 80 | 133 | 200 |

*The 2015 report excluded Indigenous tourism businesses in the Northwest Territories.
**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 $ terms. The 2019 report estimates these figures using inflation-adjusted 2017 $ terms.
Sources: 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 cooperatives and community-owned ventures, incorporated businesses, and a range of sole proprietors, including independent artists and artisans,

3 Indigenous Tourism Association of Canada, *Accelerating Indigenous Tourism Growth in Canada*.

Though their economic footprint may be smaller than a casino resort or regional airline, cultural workers define many of the authentic Indigenous cultural experiences available to tourists.

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 with a casino resort or regional airline, 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 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.

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The insights of our respondents help to identify the needs and challenges of operators who seek to provide authentic Indigenous cultural experiences.

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.

Previous page: Connecting cultures with the Wanuskewin Heritage Park, Saskatchewan.

Source: Wanuskewin Heritage Park.

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CHAPTER 2

# Profile of Canada's Indigenous Tourism Sector

## Chapter Summary

- ITAC's current inventory of Indigenous businesses in the tourism sector captures 1,875 businesses from across 37 industry subsectors and groups, which were then organized under eight tourism sector domains.
- Seven per cent of the 1,875 businesses were found to be export-ready, 34 per cent were market-ready, 31 per cent were at the "doors open" stage, and 28 per cent were visitor-ready.
- In response to our survey, 286 Indigenous businesses described how their operations were structured: 30 per cent were incorporated for-profit businesses; 26 per cent were sole proprietors, and 17 per cent were not-for-profit organizations.

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.)

Previous page: Sharing musical moments in Yukon.

Source: Yukon First Nations Culture and Tourism Association.

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Leading Indigenous tourism operators and businesses contributed perspectives around growth, cultural tourism, and regional tourism.

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 businesses 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:[1]

- **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.

1 Statistics Canada, North American Industry Classification System.

The majority of Indigenous tourism businesses were incorporated for-profit businesses.

- **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, and 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.
- **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 travellers. 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 provides a summary of the resulting business classifications by provincial, territorial, and national roll-up.

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Table 2

**Breakdown of ITAC Business Inventory by Tourism Sector Domains and Region**

(number of businesses)

| Region | N.L. | P.E.I. | N.S. | N.B. | Que. | Ont. | Man. | Sask. | Alta. | B.C. | Y.T. | N.W.T. | Nun. | Canada |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL | 72 | 20 | 29 | 51 | 217 | 558 | 91 | 90 | 125 | 341 | 82 | 92 | 107 | 1,875 |
| Accommodation | 19 | n.a. | 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 | n.a. | 1 | 5 | 159 |
| Gaming | n.a. | n.a. | 1 | 6 | n.a. | 9 | 3 | 7 | 5 | 4 | n.a. | n.a. | n.a. | 35 |
| Other | 2 | 2 | 2 | 1 | 13 | 22 | 5 | 2 | 3 | 16 | 3 | 2 | 2 | 75 |
| Recreation and outdoor adventure | 2 | 1 | n.a. | 2 | 47 | 63 | 12 | 12 | 12 | 44 | 9 | 32 | 15 | 251 |
| Transportation | 11 | 1 | n.a. | 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 |

n.a. = not available
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). Following 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 arm's-length Indigenous economic development corporations. In terms of registered businesses, the remaining pool of respondents belonged either to partnerships (10 per cent) or cooperatives (2 per cent). Cooperatives were primarily found across Inuit Nunangat, in Nunavut, the Inuvialuit region of the Northwest Territories, 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**

(per cent)

| | Accommodation | Arts and heritage | Food and beverage | Gaming | Other | Recreation and outdoor adventure | Transportation | Travel services (retail) | Grand total |
|---|---|---|---|---|---|---|---|---|---|
| For-profit corporation | 42 | 10 | 27 | 33 | 53 | 38 | 41 | 28 | 30 |
| Sole proprietor | 22 | 28 | 27 | 0 | 9 | 35 | 29 | 31 | 26 |
| Not-for-profit corporation | 5 | 34 | 9 | 50 | 16 | 8 | 6 | 13 | 17 |
| Indigenous-owned | 8 | 15 | 18 | 0 | 13 | 5 | 12 | 3 | 10 |
| Partnership | 12 | 7 | 0 | 17 | 3 | 15 | 0 | 22 | 10 |
| Unregistered | 5 | 6 | 18 | 0 | 6 | 0 | 6 | 0 | 5 |
| Cooperative | 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 on 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

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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).

- **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 doors-open stage, 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**

(per cent)

| | Doors open | Visitor-ready | Market-ready | Export-ready | Number of businesses |
|---|---|---|---|---|---|
| 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** | **1875** |

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

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 accommodation, recreation and outdoor adventure, and transportation. In comparison, travel services–retail, food and beverage, and arts and heritage domains 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. Though essential for travel, over 40 per cent of these establishments were 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 slightly 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 (e.g., via Indigenous and rural business listings, associations).

Sharing a long Mi'kmaq history in Miawpukek First Nation, Newfoundland and Labrador.

Source: Miawpukek First Nation.

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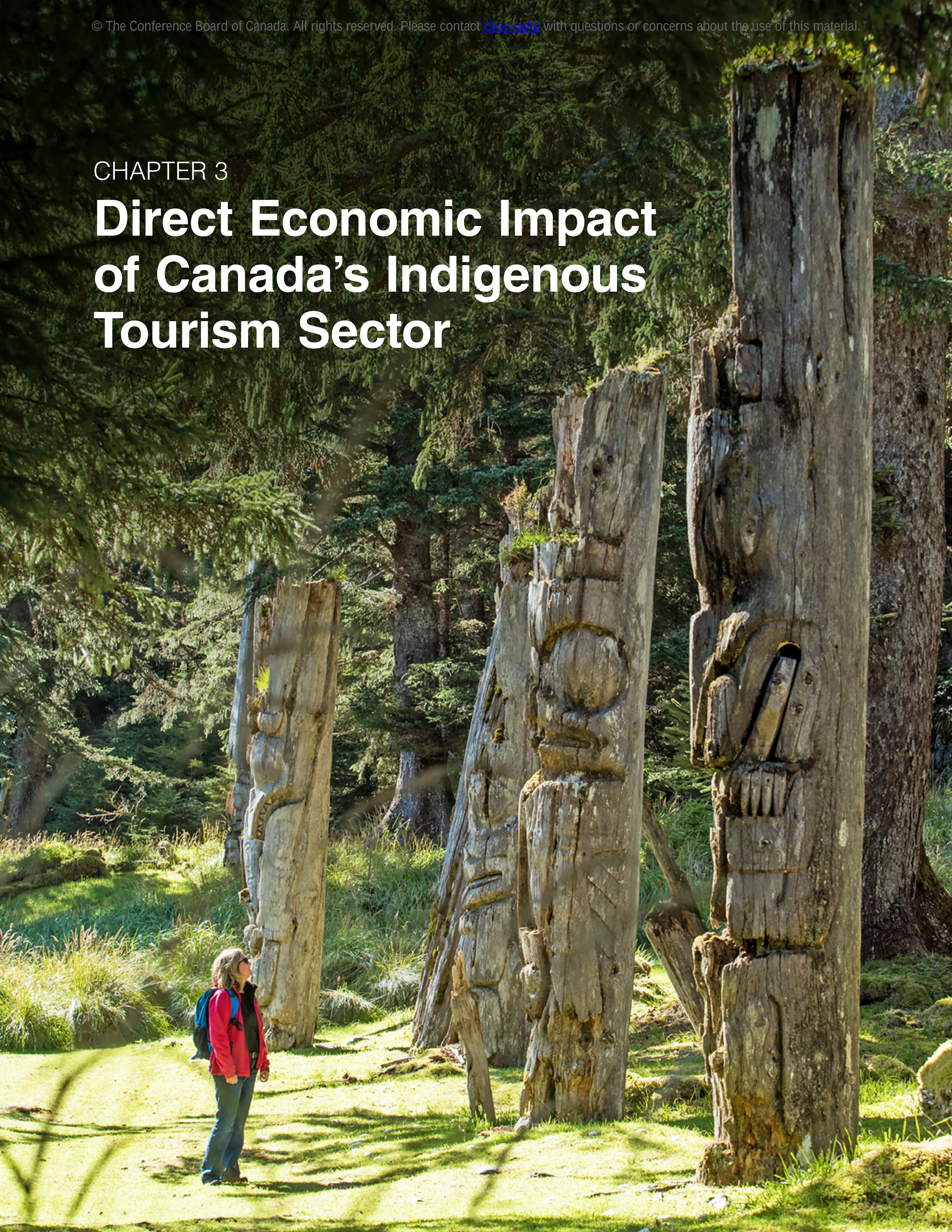
CHAPTER 3

# Direct Economic Impact of Canada's Indigenous Tourism Sector



## Chapter Summary

- The Indigenous tourism sector in Canada employed just over 39,000 people 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.
- Of the 39,000 workers in the Indigenous tourism sector in 2017, just over half worked in Ontario or British Columbia.
- At the same time, employment in the territories amounted to under 4,400 people, or 11 per cent of the total employment in 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.[1]

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.[2] 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.

1 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.

2 It was assumed that seasonal employment involved an average of five months' employment; thus, each seasonal position counted as 5/12 of a full-year-equivalent position.

Previous page: Looking at stories written in time with Haida Tourism, British Columbia.

Source: Haida Tourism.

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# 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 people 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.)

Table 5

**Employment in the Indigenous Tourism Sector, by Domain, 2017**

| 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.

Spending quality time with the family at the Metepenagiag Heritage Park, New Brunswick.

Source: Metepenagiag Heritage Park.

Of the 39,000 people working in the Indigenous tourism sector in 2017, just over half (51 per cent) 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.) (See Appendix C for further details regarding the specific direct economic impacts associated with the Indigenous tourism sector.)

Table 6
**Employment in the Indigenous Tourism Sector, by Province/Territory, 2017**

| Province/territory | Employment (jobs) | Employment (full-year jobs) |
|---|---|---|
| N.L. | 1,004 | 783 |
| P.E.I. | 187 | 146 |
| N.S. | 876 | 795 |
| N.B. | 829 | 692 |
| Que. | 4,083 | 3,178 |
| Ont. | 12,924 | 10,750 |
| Man. | 1,255 | 1,002 |
| Sask. | 3,608 | 2,984 |
| Alta. | 2,939 | 2,395 |
| B.C. | 6,957 | 5,137 |
| Y.T. | 974 | 758 |
| N.W.T. | 1,675 | 1,358 |
| Nun. | 1,727 | 1,459 |
| **TOTAL TOURISM SECTOR** | **39,036** | **31,439** |

Source: The Conference Board of Canada.

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. 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)

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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.

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 more than $1.7 billion in direct GDP for Canada in 2017. These direct economic impacts stem from the estimated revenues of Indigenous tourism businesses and self-employed individuals, which amounted to nearly $3.8 billion. (See Table 7.)

Table 7

**Direct Economic Footprint of Indigenous Tourism Sector, by Domain, 2017**

($ millions)

| Domains | Labour income | GDP (basic prices) | Revenues |
|---|---|---|---|
| Accommodation | 158.1 | 251.5 | 455.0 |
| Recreation and outdoor activities | 117.1 | 184.8 | 330.2 |
| Gaming | 189.0 | 240.6 | 605.6 |
| Food and beverage | 71.8 | 84.9 | 191.7 |
| Arts and 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 and 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 Indigenous Tourism Sector, by Province/Territory, 2017**

($ millions)

| Province/territory | Labour income | GDP (basic prices) | Revenues |
|---|---|---|---|
| N.L. | 33.4 | 47.6 | 95.2 |
| P.E.I. | 2.8 | 4.2 | 7.2 |
| N.S. | 23.0 | 31.6 | 51.4 |
| N.B. | 16.5 | 24.3 | 71.3 |
| Que. | 99.1 | 156.0 | 297.6 |
| Ont. | 382.6 | 622.1 | 1,368.3 |
| Man. | 30.2 | 41.7 | 94.1 |
| Sask. | 98.4 | 116.7 | 252.9 |
| Alta. | 108.8 | 166.2 | 387.7 |
| B.C. | 167.4 | 260.3 | 524.2 |
| Y.T. | 24.3 | 35.2 | 83.5 |
| N.W.T. | 59.6 | 102.9 | 262.1 |
| Nun. | 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 and 2017 from the Conference Board's electronic database.

To ensure that 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 per cent of the total workforce of Indigenous businesses.[3] The degree to which Indigenous payrolls differed from non-Indigenous payrolls

3 Canadian Council for Aboriginal Business, *Promise and Prosperity*, 20.

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Our study of Indigenous tourism in Canada found that 1,875 Indigenous-owned businesses participated in the tourism sector in 2017.

was determined using various profiles from Statistics Canada's 2016 Census that revealed average employment income on an industry basis for full-time work for both Indigenous and non-Indigenous workers.[4]

## 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 in 2017.

In addition to the sheer number of businesses in the updated inventory, the current inventory also differed from the previous 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 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 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 are reported to be over 43 per cent higher in 2017

4 Statistics Canada, 2016 Census of Population.


The Indigenous tourism sector has increased between 2014 and 2017, and may outstrip those of overall tourism activity in Canada.

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compared with 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 (per cent) |
|---|---|---|---|---|
| Businesses* | 1,579 | 1,875 | 296 | 18.7 |
| Direct employment (peak employment) | 33,112 | 39,036 | 5,924 | 17.9 |
| Direct employment (full-year jobs)** | 26,797 | 31,439 | 4,642 | 17.3 |
| Direct GDP ($ millions)*** | 1,415 | 1,743 | 328 | 23.2 |
| Direct labour income ($ millions) | 870 | 1,140 | 270 | 31.0 |
| Direct revenues ($ millions) | 2,651 | 3,794 | 1,143 | 43.1 |

*2014 estimates did not account for Indigenous tourism businesses operating in the Northwest Territories.
**2014 estimates reported standardized employment estimates as full-time-equivalent jobs and not full-year jobs.
***2014 estimates for GDP, wages and salaries, and output were reported in 2014 $ terms, while the current report measures estimated used inflation-adjusted 2017 $ terms.
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,[5] 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.

Table 10 shows some of the high-level measures that are reported for overall tourism activity in Canada.[6] 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

5 The challenges raised earlier include differences in the underlying business inventories used and possible changes affecting how businesses responded between the two studies' surveys.

6 Statistics Canada, National Tourism Indicators.

Previous page: A place to taste creative Indigenous cuisine, the Sagamité Restaurant in Wendake, Quebec.

Source: Sagamité Restaurant.

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.

Table 10

**Direct Economic Impact Measures Reported for Overall Tourism Activity in Canada**

| Measures | 2014 | 2017 | Change | Change (per cent) |
|---|---|---|---|---|
| Direct employment (full-year jobs) | 700,300 | 736,100 | 35,800 | 5.1 |
| Direct GDP ($ millions)* | 36,056 | 41,275 | 5,219 | 14.5 |
| Direct revenue (tourism activity) | 86,483 | 97,474 | 10,991 | 12.7 |

*2014 figures are reported in 2014 $ terms, while the 2017 figures are reported using inflation-adjusted 2017 $ terms.
Sources: The Conference Board of Canada; Statistics Canada, National Tourism Indicators.

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 changes 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.

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CHAPTER 4

# Insights From Operators

## Chapter Summary

- Cultural tourism is a priority for more than 60 per cent of the 286 Indigenous tourism operators surveyed.
- The survey respondents most frequently identified access to financing and marketing support and training as their most desired supports for business development and growth.
- An important consideration for them is ensuring that cultural experiences are authentic and respectful of the communities represented in exchanges with tourists.

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. The resulting survey response set totalled 286 Indigenous tourism operators (though the total number varies depending on the depth of questions engaged with). Cultural tourism is a priority for more than 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 that 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

Previous page: Experience knowledge passed down from generation to generation with Tundra North Tours, Northwest Territories.

Source: Tundra North Tours.

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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 concerns similar to those of other Indigenous and rural small and medium-sized enterprises.[1] (See Table 11.)

Table 11
**Supports Needed by Indigenous Tourism Businesses, by Business Structure**
(n = 216; per cent)

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

1 Conference Board of Canada, The, *Research Module 3*.

# 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 approaches, 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**
(n = 170; per cent)

| | Unregistered | Sole proprietor | Partnership | For-profit | Not-for-profit | Coop | Indigenous ownership | Total |
|---|---|---|---|---|---|---|---|---|
| Community ownership | 11 | 13 | 29 | 16 | 29 | 20 | 20 | 38 |
| Community advisory committee | 0 | 10 | 0 | 17 | 13 | 20 | 20 | 25 |
| Consultation with Elders/ cultural leaders | 44 | 36 | 38 | 30 | 22 | 20 | 26 | 58 |
| Community meetings | 11 | 9 | 17 | 13 | 13 | 20 | 8 | 22 |
| Order in Council/Band Council Resolution | 0 | 8 | 13 | 8 | 9 | 20 | 10 | 17 |
| Other process | 22 | 15 | 4 | 13 | 9 | 0 | 10 | 22 |
| Don't know | 11 | 10 | 0 | 2 | 4 | 0 | 6 | 10 |
| **TOTAL RESPONDENTS WITH A CULTURAL FOCUS** | **8** | **54** | **13** | **36** | **36** | **2** | **21** | **170** |

Source: The Conference Board of Canada.

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An important consideration for cultural tourism providers is ensuring that cultural experiences are authentic and respectful of communities.

Cultural tourism operators were more likely to mention a need for Indigenous leadership in shaping regional tourism policies.

Participation in cultural tourism also appears to influence an operator's market orientation. Compared with 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 or territory (at 60 per cent vs. 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 vs. 40 per cent), Europe (40 per cent vs. 20 per cent), and China (20 per cent vs. 10 per cent). Operators with a cultural focus also more frequently expressed several unique challenges compared with 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.

Previous page:
Experiencing a traditional experience in a modern society with Aboriginal Experiences, Ontario.

Source: Aboriginal Experiences.

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Table 13

**Marketing Focus of Indigenous Tourism Operators, by Region**

(n = 267; per cent)

| Province/ territory | Same province or territory | Rest of Canada | United States | Europe | China | Other Asian | Other countries | Total (n) |
|---|---|---|---|---|---|---|---|---|
| N.L. | 86 | 57 | 36 | 21 | 0 | 0 | 14 | 14 |
| P.E.I. | 100 | 100 | 100 | 33 | 0 | 0 | 33 | 3 |
| N.S. | 100 | 50 | 25 | 0 | 25 | 0 | 25 | 4 |
| N.B. | 100 | 50 | 75 | 50 | 25 | 0 | 0 | 4 |
| Que. | 97 | 39 | 32 | 48 | 10 | 6 | 16 | 31 |
| Ont. | 88 | 55 | 38 | 26 | 12 | 2 | 14 | 42 |
| Man. | 91 | 74 | 39 | 26 | 13 | 9 | 22 | 23 |
| Sask. | 92 | 58 | 17 | 0 | 8 | 0 | 0 | 12 |
| Alta. | 88 | 61 | 39 | 33 | 18 | 9 | 30 | 33 |
| B.C. | 92 | 75 | 53 | 39 | 18 | 8 | 16 | 51 |
| Y.T. | 65 | 76 | 47 | 24 | 6 | 0 | 18 | 17 |
| N.W.T. | 77 | 59 | 32 | 23 | 9 | 9 | 18 | 22 |
| Nun. | 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 Prince Edward Island, 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 British Columbia and Yukon appear to have a relatively strong focus on the United States. These latter impressions for Quebec, British Columbia, and Yukon appear to resonate with market research recently undertaken by ITAC and Destination Canada.[2]

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 provides a summary of the policy areas ranked first

2 Destination Canada, *2019 Market Snapshots*.

by operators, for each region and rolled up nationally. In cases of ties, the policy areas that operators ranked as being equally important are included, as seen for Nova Scotia and Nunavut.

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.

Table 14

**Top Policy Areas Prioritized by Indigenous Tourism Operators, by Region**

(n = 214)

| Region | N.L. | P.E.I. | N.S. | N.B. | Que. | Ont. | Man. | Sask. | Alta. | B.C. | Y.T. | N.W.T. | Nun. | Canada |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Indigenous cultural tourism experiences | | | | | | | | | | | | | | |
| Indigenous leadership for authentic Indigenous tourism industry | | | | | | | | | | | | | | |
| Indigenous tourism growth strategy | | | | | | | | | | | | | | |
| Tourism training and capacity development | | | | | | | | | | | | | | |
| Understanding tourism, need for education and resource materials | | | | | | | | | | | | | | |
| Access to business capital | | | | | | | | | | | | | | |
| Appreciation from visitors for Indigenous knowledge and traditions | | | | | | | | | | | | | | |
| Growing and maintaining a strong reputation with tourism industry | | | | | | | | | | | | | | |
| Lack of infrastructure | | | | | | | | | | | | | | |
| Business planning and start-up assistance | | | | | | | | | | | | | | |
| Opportunities for Indigenous youth | | | | | | | | | | | | | | |
| Other (policy areas identified by respondents) | | | | | | | | | | | | | | |

Source: The Conference Board of Canada.

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CHAPTER 5

# Conclusion

## Chapter Summary

- The Indigenous tourism sector in Canada appears to have substantially increased between 2014 and 2017.
- We encountered evidence of growth among key contributors to employment and GDP, such as air transportation, resort casinos, and travel services–retail.
- In addition, we encountered culturally focused operators whose objectives seek balanced growth that also promotes local cultures, preserves heritage, and supports community economic development.

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 the association's 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, cooperatives and community-owned ventures, as well as incorporated businesses, and a range of sole proprietors who 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.)

Previous page: Living a traditional ceremony at the Spirit Bear Lodge, British Columbia.

Source: Jack Plant Photography.

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Operators want improved access to capital, and more investments in tourism training and capacity development.

Though their economic footprint may be smaller when compared with the large drivers of GDP growth, these operators provide the authentic Indigenous cultural experiences available to tourists in Canada.

Compared with 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 with 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 on which to focus, 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 emphasized measures to stimulate further sector growth, including more investments in tourism training and capacity development, and improving operators' access to capital.

Some of the many pieces of art at Sipuke'l Gallery, Nova Scotia.

Source: Sipuke'l Gallery.

APPENDIX A

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APPENDIX B

# Mapping of Industry Groups to Indigenous Tourism Sector Domains

Table 1

**Indigenous Tourism Sector Domains and Subdomains**

| Indigenous tourism sector domains | Subdomains |
|---|---|
| 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 |

(continued …)

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Table 1 (cont'd)

**Indigenous Tourism Sector Domains and Subdomains**

| Indigenous tourism sector domains | Subdomains |
|---|---|
| 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 1

**Selected Direct Economic Impact Measures**

| Province | Employment (full-year jobs; number) | Labour income | GDP (basic prices; $ millions) | Output |
|---|---|---|---|---|
| N.L. | 783 | 33.4 | 47.6 | 95.2 |
| P.E.I. | 146 | 2.8 | 4.2 | 7.2 |
| N.S. | 795 | 23.0 | 31.6 | 51.4 |
| N.B. | 692 | 16.5 | 24.3 | 71.3 |
| Que. | 3,178 | 99.1 | 156.0 | 297.6 |
| Ont. | 10,750 | 382.6 | 622.1 | 1,368.3 |
| Man. | 1,002 | 30.2 | 41.7 | 94.1 |
| Sask. | 2,984 | 98.4 | 116.7 | 252.9 |
| Alta. | 2,395 | 108.8 | 166.2 | 387.7 |
| B.C. | 5,137 | 167.4 | 260.3 | 524.2 |
| Y.T. | 758 | 24.3 | 35.2 | 83.5 |
| N.W.T. | 1,358 | 59.6 | 102.9 | 262.1 |
| Nun. | 1,459 | 93.7 | 133.8 | 297.8 |
| **CANADA TOTAL** | **31,439** | **1,139.8** | **1,742.6** | **3,793.5** |

Source: The Conference Board of Canada.

Table 2

**Direct Employment, Atlantic Canada**

(jobs)

| Province | N.L. | P.E.I. | N.S. | N.B. | Atlantic Canada |
|---|---|---|---|---|---|
| TOTAL | 1,004 | 187 | 876 | 829 | 2,897 |
| Accommodation | 227 | n.a. | 91 | 16 | 334 |
| Recreation and outdoor activities | 75 | 23 | 5 | 47 | 151 |
| Gaming | n.a. | n.a. | n.a. | 168 | 168 |

(continued …)

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## Table 2 (cont'd)

### Direct Employment, Atlantic Canada

(jobs)

| Province | N.L. | P.E.I. | N.S. | N.B. | Atlantic Canada |
|---|---|---|---|---|---|
| Food and beverage | 129 | 48 | 72 | 313 | 563 |
| Arts and heritage | 122 | 58 | 86 | 117 | 384 |
| Transportation | 279 | 16 | n.a. | 31 | 326 |
| Travel services–retail | 112 | 33 | 602 | 88 | 834 |
| Other | 59 | 10 | 20 | 48 | 137 |

n.a. = not available
Source: The Conference Board of Canada.

## Table 3

### Direct Employment, Central Canada and Prairies

(jobs)

| Province | Que. | Ont. | Man. | Sask. | Alta. |
|---|---|---|---|---|---|
| TOTAL | 4,083 | 12,924 | 1,255 | 3,608 | 2,939 |
| Accommodation | 1,011 | 1,307 | 194 | 192 | 294 |
| Recreation and outdoor activities | 1,154 | 1,705 | 235 | 296 | 414 |
| Gaming | n.a. | 2,425 | 168 | 1,737 | 500 |
| Food and beverage | 517 | 1,843 | 44 | 276 | 151 |
| Arts and 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 |

n.a. = not available
Source: The Conference Board of Canada.

## Table 4

### Direct Employment, British Columbia/North and Canada Total

(jobs)

| Province | B.C. | Y.T. | N.W.T. | Nun. | Canada |
|---|---|---|---|---|---|
| TOTAL | 6,957 | 974 | 1,675 | 1,727 | 39,036 |
| Accommodation | 976 | 216 | 496 | 426 | 5,447 |
| Recreation and outdoor activities | 2,440 | 202 | 430 | 362 | 7,388 |
| Gaming | 569 | n.a. | n.a. | n.a. | 5,567 |
| Food and beverage | 487 | n.a. | 24 | 40 | 3,945 |
| Arts and 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 |

n.a. = not available
Source: The Conference Board of Canada.

Table 5
## Direct GDP, Atlantic Canada
($ millions)

| Province | N.L. | P.E.I. | N.S. | N.B. | Atlantic Canada |
|---|---|---|---|---|---|
| TOTAL | 47.6 | 4.2 | 31.6 | 24.3 | 107.7 |
| Accommodation | 13.0 | n.a. | 4.4 | 0.5 | 17.8 |
| Recreation and outdoor activities | 2.0 | 0.4 | 0.1 | 0.9 | 3.3 |
| Gaming | n.a. | n.a. | n.a. | 10.1 | 10.1 |
| Food and beverage | 2.8 | 0.9 | 1.3 | 5.4 | 10.4 |
| Arts and heritage | 2.3 | 1.2 | 1.8 | 1.5 | 6.8 |
| Transportation | 20.5 | 0.6 | n.a. | 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 |

n.a. = not available
Source: The Conference Board of Canada.

Table 6
## Direct GDP, Central Canada and Prairies
($ millions)

| Province | Que. | Ont. | Man. | Sask. | Alta. |
|---|---|---|---|---|---|
| TOTAL | 156.0 | 622.1 | 41.7 | 116.7 | 166.2 |
| Accommodation | 45.0 | 54.9 | 5.6 | 7.5 | 16.7 |
| Recreation and outdoor activities | 23.7 | 41.1 | 4.3 | 6.7 | 11.1 |
| Gaming | n.a. | 123.3 | 3.7 | 58.8 | 19.0 |
| Food and beverage | 10.6 | 39.5 | 0.8 | 6.3 | 3.8 |
| Arts and 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 |

n.a. = not available
Source: The Conference Board of Canada.

Table 7
## Direct GDP, British Columbia/North and Canada Total
($ millions)

| Province | B.C. | Y.T. | N.W.T. | Nun. | 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 and outdoor activities | 70.9 | 4.1 | 11.7 | 7.8 | 184.8 |
| Gaming | 25.6 | n.a. | n.a. | n.a. | 240.6 |
| Food and beverage | 9.2 | n.a. | 0.9 | 3.4 | 84.9 |
| Arts and 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 |

n.a. = not available
Source: The Conference Board of Canada.

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