

The Impact of COVID-19 on Canada's Indigenous Tourism Sector: 2021 update.

Presented to:

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Executive Summary

This report was commissioned by the Indigenous Tourism Association of Canada (ITAC) to provide an updated economic assessment of Canada's Indigenous tourism sector under the COVID-19 pandemic. The report builds off research conducted in 2020 and applies new information gathered from Indigenous tourism operators and ITAC's stakeholders in Spring-Summer 2021. The resulting analysis revises our previous 2019 and 2020 direct economic footprints of the Indigenous tourism sector and provides 2021 estimates of Gross Domestic Product (GDP), employment, and associated business characteristics.

This report incorporates significant changes to ITAC's inventory of businesses in Canada's Indigenous tourism sector. Between 2020 and 2021, The Conference Board worked with ITAC and its Provincial/Territorial Indigenous partners to update and revise their inventory of businesses. The revised inventory indicates that at least 1,889 Indigenous businesses participate in Canada's Indigenous tourism sector. In 2021, just over 18,000 people work in the sector's associated industries. Their combined direct economic footprint in 2021 is estimated to exceed \$774 million in GDP. Based on a high-level comparison between our 2021 estimates and revised footprint for 2019, it appears that drastic losses in direct employment and GDP have resulted from COVID-19's impact on the Indigenous tourism sector. Compared to 2019, our 2021 impact assessment projects a 57 per cent decline in direct GDP, down from \$1.78 billion, and a 51 per cent decline in employment, down from almost 37,000 jobs. Yet, the sector also appears to have moderately rebounded from 2020's catastrophic declines. Compared to our revised 2020 estimates, direct GDP in 2021 increased by \$219 million, while employment increased by just over 6,100 jobs.

Diverse businesses occupy the Indigenous tourism sector 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. Our combined survey research and economic assessment in 2021 indicate that the pandemic has had a deep and serious impact on most businesses in the sector. Based on our research it is estimated that at least a third could be at serious risk of closure in 2021-2022.

1.0 Background

This report, commissioned by the Indigenous Tourism Association of Canada (ITAC), provides an economic assessment of COVID-19’s impact on the Indigenous tourism sector in Canada. While the report updates our previous 2020 assessment for ITAC¹, it also applies a substantially revised inventory of the tourism sector developed in collaboration with ITAC and its Provincial/Territorial Indigenous partners.

Based on the revised inventory, our findings indicate that at least 1,889 entrepreneurs and organizations participate in Canada’s Indigenous tourism sector. In 2021, just over 18,000 people work in the sector’s associated industries. Their combined direct economic footprint in 2021 is estimated to exceed \$774 million in Gross Domestic Product (GDP). (See Table 1.1).

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 the Canadian GDP impact of Indigenous tourism will increase to \$1.9 billion; and the Indigenous tourism workforce will increase to 49,000. While our assessments through to 2019 suggest the sector has been steadily advancing towards these goals, the estimates for 2020 and 2021, under the impact of COVID-19, present a stark contrast. Our revised 2020 assessment suggests that, at \$555 million, the sector’s direct GDP footprint shrunk by almost 69 per cent compared to 2019. (See Table 1.1). In 2021, the sector appears to be on a cautious rebound as various subsectors – including air transportation and accommodations – experience improved consumer demand stirred by growing vaccination rates and loosening restrictions. But there is still considerable uncertainty surrounding its full recovery under the ongoing threat of COVID-19’s next waves.

Table 1.1
Summary of key measures and ITAC’s goals for the Indigenous tourism sector in Canada

Measures	Revised 2019 estimates	Revised 2020 estimates	2021 estimates	2024 goals
Direct Employment (Peak Employment)	36.7k	11.9k	18k	49k
Direct GDP	\$1.78B	\$555.1M	\$774.2M	\$1.9B

¹ The Conference Board of Canada. The Impact of COVID-19 on Canada’s Indigenous Tourism Sector: Insights from Operators, custom report for the Indigenous Tourism Association of Canada, June 15, 2020.

Source: The Conference Board of Canada

In the process of updating ITAC's inventory with its partners, over 2020 and 2021, we discovered an additional 190 businesses over the previous count of 1,699. Our survey research however found that COVID-19's impacts continue to threaten many tourism operators and could result in at least 674 business closures in 2021 and 2022. Without sustained actions to support the sector's ongoing recovery beyond 2021, there remains a serious risk that ITAC's strategic goals could be in jeopardy.

Our discussion of findings is broken down into three chapters. In Chapter 2 we present an updated profile of the Indigenous tourism sector in Canada based on ITAC's revised inventory of 1,889 businesses. This chapter provides an overview of the sector and serves as a primer for understanding the current context of our economic impact assessment in Chapter 4. Our discussion in Chapter 2 walks readers through ITAC's updated business inventory and highlights key characteristics of its featured businesses, drawing on information from our 2020 and 2021 surveys of Indigenous tourism operators.

In Chapter 3 we provide insights from the 346 Indigenous tourism operators who participated in an in-depth 2021 survey. This chapter summarizes key dimensions of what operators' have been experiencing under COVID-19 and what they anticipate in 2021-2022. Our discussion includes operators' perceptions of how long the impacts of COVID-19 may last, how severe COVID-19's impacts have been on their business operations and across different market segments, and how well-informed and resilient they feel under uncertain pandemic conditions.

In Chapter 4 we then provide an updated 2021 direct economic footprint of the Indigenous tourism sector that addresses ITAC's key performance measures of GDP, employment, and business growth under the impact of COVID-19. Our discussion of the footprint compares COVID-19's impacts in 2021 to revised estimates for 2020 and 2019.

2.0 Profile of Canada's Indigenous Tourism Sector

Defining the Indigenous Tourism Sector

Based on ITAC and its Provincial/Territorial Indigenous partners' combined understanding, the Indigenous tourism sector in Canada comprises at least 1,889 businesses spread across 42 different industry subsectors. Following ITAC's approach to defining the sector, we aggregate these industry subsectors into nine different tourism industry domains as indicated below. (See Chart 2.1). Our 2019 report for ITAC provides details on the aggregation and definitional aspects of these industry domains.²

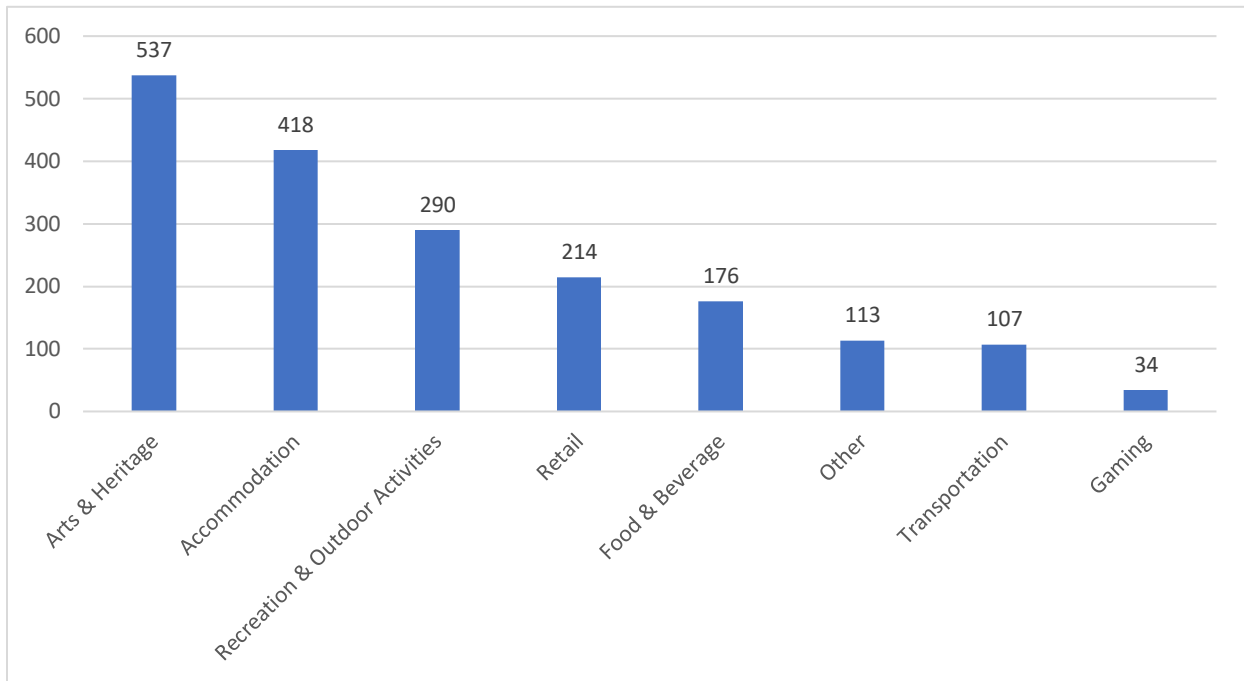
Since the release of its 2014-15 study, ITAC has continued to develop an inventory of Indigenous tourism businesses in Canada. To be eligible for inclusion in the inventory, businesses must be majority owned, operated, and/or controlled by First Nations, Métis, or Inuit peoples, and be able to demonstrate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

In cooperation with ITAC's staff and Provincial/Territorial Indigenous partners, we spent over six 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 Appendix B for more information about the revised inventory).

The Indigenous tourism sector is quite diverse, 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.

² Fiser, Adam and Gregory Hermus. Canada's Indigenous Tourism Sector: Insights and Economic Impact, The Conference Board of Canada, May 2019.

Chart 2.1
Tourism businesses within each industry domain
 (Number of businesses)



Source: The Conference Board of Canada

Business Structure

Our 2020 and 2021 industry surveys took a closer look at how the businesses in ITAC's inventory are structured. Across these combined surveys, 673 Indigenous tourism businesses from the revised inventory described how their operations were structured. The majority were sole proprietors (34 per cent), followed by incorporated for-profit businesses (27 per cent). Sole proprietors constituted a large proportion of the recreation and outdoor activities domain, as well as arts and heritage. 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 not-for-profit corporations (14 per cent) and partnerships (14 per cent). 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, 5 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 to cooperatives (1 per cent). Cooperatives were primarily found across Inuit Nunangat, in Nunavut, the Inuvialuit region of the Northwest

Territories, and Nunavik—Northern Quebec. Lastly, 4 per cent of respondents indicated they were operating as an unregistered business.

Market Readiness

Another important facet of our work with ITAC and its Provincial/Territorial Indigenous partners was to classify the businesses in its revised inventory by market readiness. In this case, we applied ITAC's four-stage definition of market readiness using the following characteristics, developed by ITAC, 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 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, transportation, 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 six months, we worked through ITAC's inventory using data from environmental scans, guidance from industry associations, and telephone outreach to rate each business. ITAC and its Provincial/Territorial Indigenous partners then reviewed our results and provided input based on their knowledge of the Indigenous tourism businesses in the inventory. Almost 9 per cent of the 1,889 businesses in the inventory were found to be export ready. In

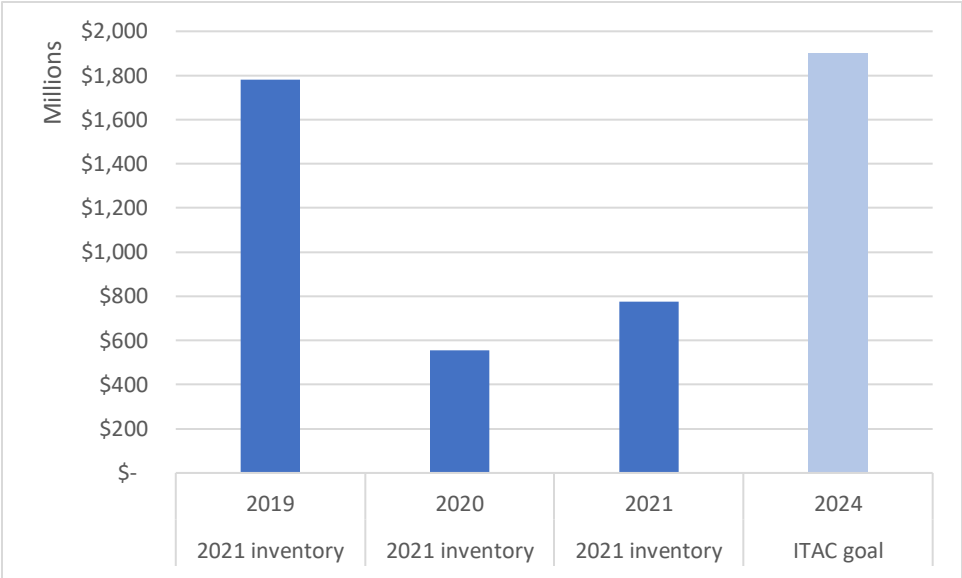
comparison, almost 37 per cent were found to be market ready, 33 per cent were found to be visitor ready, and 21 per cent were found to be at the doors open stage.

2019 Economic Footprint and Basis of Comparison

To assess the relative impact of COVID-19 on the Indigenous tourism sector in 2021, we established a basis of comparison for the revised inventory. To do so we estimated the size and economic footprint of the sector in 2019 and 2020 relative to 2021. (See Chart 2.2).

In our updated 2019 base case, the sector’s direct economic footprint was \$1.78 billion in GDP. In 2019, the sector also employed almost 37,000 people, with over 60 per cent being employed in Ontario (31.3 per cent), British Columbia (16 per cent), and Quebec (13.2 per cent). By comparison, employment in the territories amounted to just over 5,300 individuals or 15 per cent of total sector employment. Our updated footprint for 2020 indicates a catastrophic decline in annual GDP and employment for the sector. Compared to 2019, 2020’s revised impact assessment presents an almost 69 per cent drop in GDP and 68 per cent drop in employment. (See Chart 2.2.)

Chart 2.2
Estimated direct GDP impact of the Indigenous tourism sector relative to updated 2021 inventory and ITAC’s 2024 goal
 (\$ CAD)



Source: The Conference Board of Canada

Up until 2020, a key feature of the Indigenous tourism sector has been its robust and positive growth trajectory. The estimated footprints for the previous inventory in 2019 and in the previous impact assessments commissioned by ITAC for 2017 and 2014³, all suggest that sector-specific growth has been faster than the overall Canadian tourism sector, both in terms of GDP and employment. However, as we examine in Chapter 4, this trend has been severely curtailed under the impact of COVID-19. The next chapters provide insights into the risk perceptions of Indigenous tourism operators and the impacts they are experiencing and expecting in 2021-2022 because of the pandemic.

3.0 Insights from Operators

Between April and June 2021, we deployed a survey of Indigenous tourism operators to gather information about the current and expected impacts of COVID-19 on their business operations. 346 Indigenous-owned businesses responded to the survey in depth, providing insights into what operators' have been experiencing under COVID-19 and what they anticipate in 2021-2022. Our discussion in this chapter includes operators' perceptions of how long the impacts of COVID-19 may last, how severe COVID-19's impacts have been on their business operations and across different market segments, and how well-informed and resilient they feel under uncertain pandemic conditions.

Overall, the survey responses indicate that operators have a relatively high-level of awareness about COVID-19's impacts, not just on their own business operations, but also on their peers and the broader industry sector. Respondents are also deeply concerned that COVID-19's impacts will extend beyond 2021. Most operators experienced significant losses to revenues and employment since 2020, and many expressed concerns about the risk of closure if the situation continues beyond their 2021 season.

Social characteristics of Responding Businesses

The Indigenous tourism operators who responded to our in-depth 2021 survey reflect a diversity of cultural backgrounds, experiences, and business structures. In terms of the identity of their majority owners, over 63 per cent were Status or Treaty First Nations, over 14 per cent were Métis, and 8.5 per cent were Inuit. The remainder identified with non-Status First Nations or

³ Fiser, Adam and Gregory Hermus. Canada's Indigenous Tourism Sector: Insights and Economic Impact, The Conference Board of Canada, May 2019.

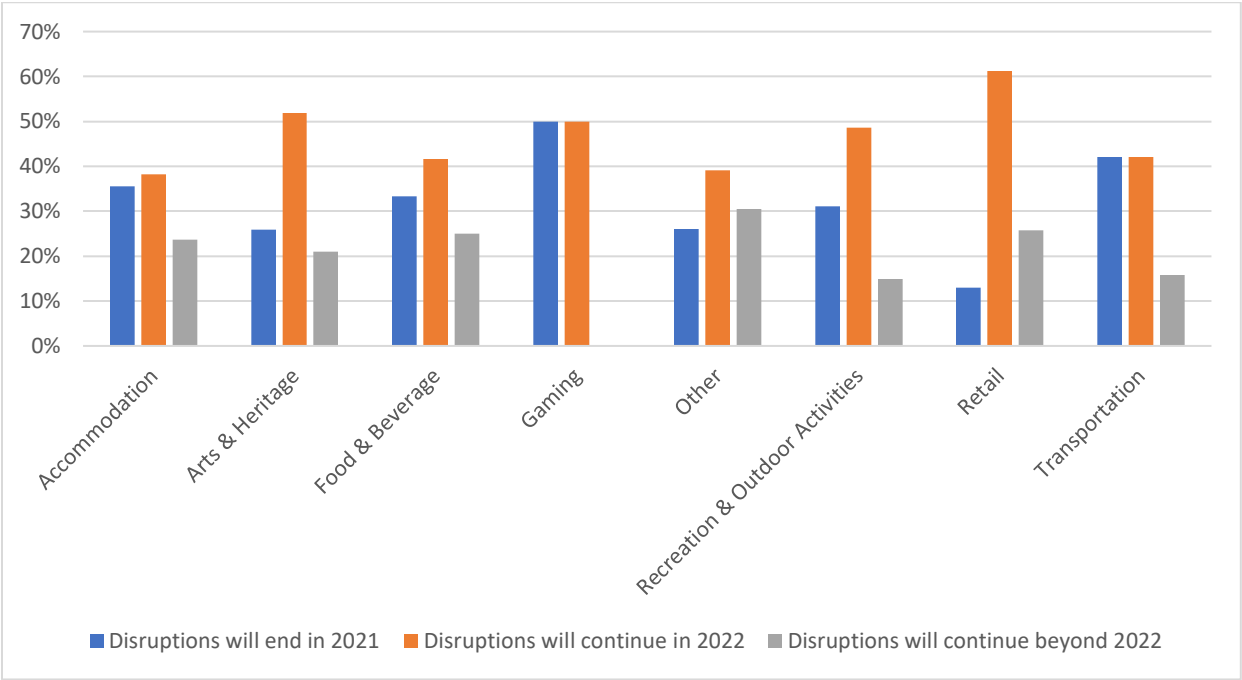
multiple Indigenous groups. Given the prevalence of First Nations identities, over 34 per cent of these businesses operated on-reserve.

In addition, operators were asked about other groups their majority-owners identified with. 36 per cent of respondents identified the majority owners as women, while one business identified as LGBTQ+. Most respondents however chose not to identify their business based on gender, sexuality, or other social characteristics beyond Indigenous identity.

How Long Will Disruptions Last?

More than 46 per cent of businesses across ITAC’s nine tourism industry domains felt that COVID-19 related disruptions would extend into 2022. By comparison almost 30 per cent felt disruptions would end in 2021 (mainly around October-December), while just over 20 per cent felt that the pandemic would continue to disrupt their businesses beyond 2022. The three industry domains where operators were most optimistic about disruptions ending in 2021 were gaming, transportation, and accommodation. (See Chart 3.1.)

Chart 3.1
Expectations about the duration of COVID-19’s disruptions, by industry domain
 (Per cent of respondents)

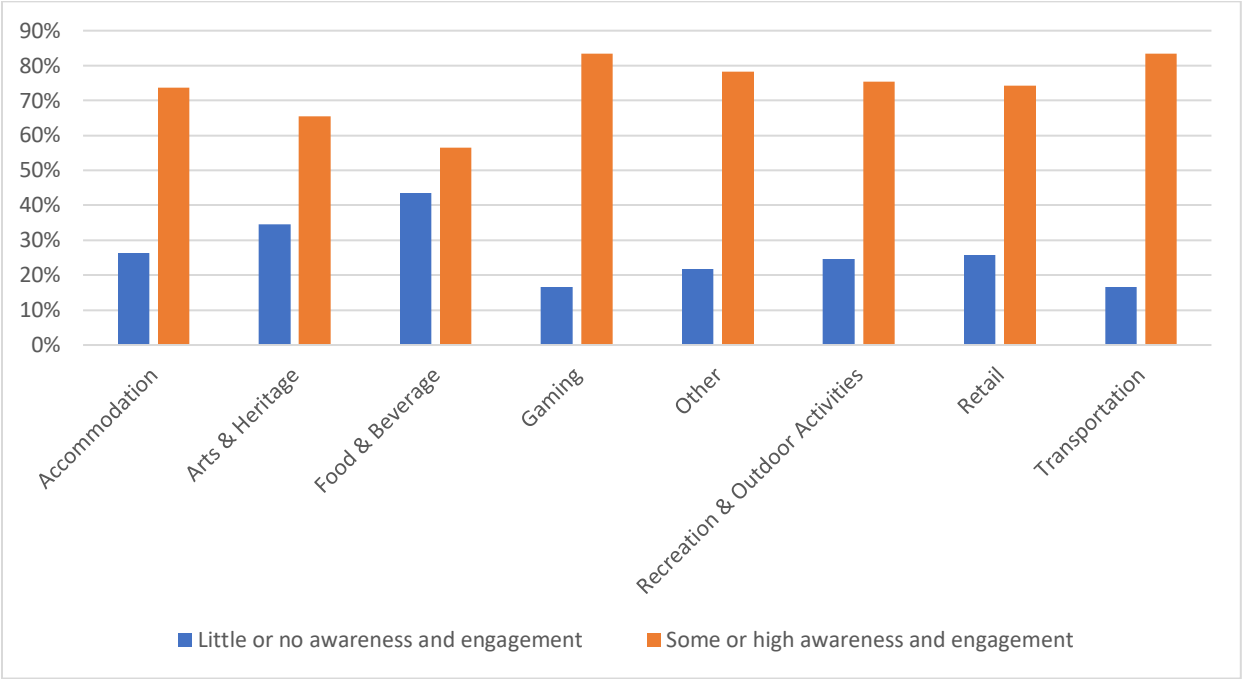


Source: The Conference Board of Canada

Awareness of the Issues and Associated Impacts

To further understand Indigenous tourism operators’ risk perceptions, the survey asked about their awareness of the issues and associated impacts. Their responses suggest that most operators, from across the sector, felt they were aware of COVID-19’s impacts on similar businesses in their region; and many also stated that they were actively seeking more information and engaging with their peers. The greatest uncertainty appeared to be among respondents in the food and beverage and arts and heritage domains. (See Chart 3.2.)

Chart 3.2
Awareness of the impact of COVID-19 on other similar businesses, by industry domain
 (Categorized awareness levels, Per cent of respondents)



Source: The Conference Board of Canada

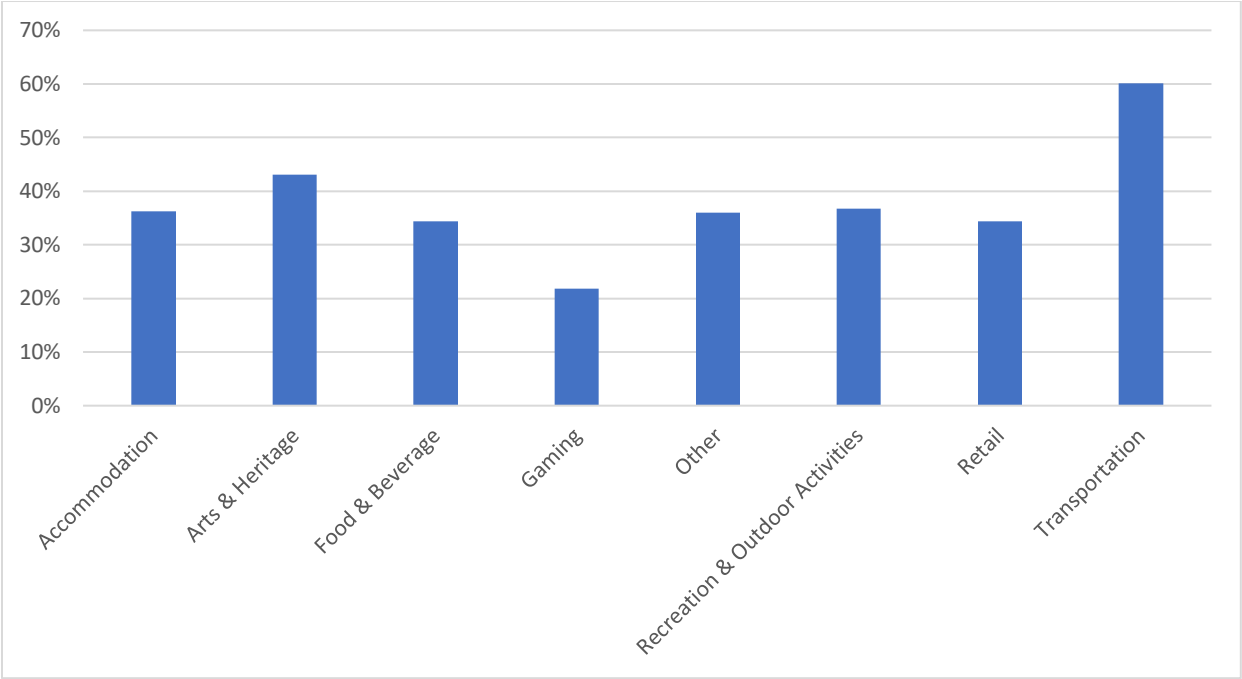
Expected Revenue Losses by Market Segment

In terms of market segmentation, respondents expected their greatest percentage share of revenue losses to come from visitors outside of Canada or from visitors outside their own province/territory. Businesses within gaming and accommodation felt that there could be a 63 per cent or more decline in 2021 revenues from visitors outside of Canada. Slightly more modest declines were projected for visitors or locals from within their own province/territory.

Expectation of Permanent Closure Due to COVID-19

The average respondent in 2021 felt there was a greater than 37 per cent chance of permanent business closure in 2021 due to COVID-19 related disruptions. Businesses within transportation domains, both air and other, were the most concerned about threats of permanent closure under COVID-19. (This was especially the case for smaller operators). Meanwhile, respondents in the gaming, retail, and food and beverage domains were more confident in their businesses' resilience. (See Chart 3.3.)

Chart 3.3
Risk of having to close operations permanently due to COVID-19, by industry domain
(Per cent chance)



Source: The Conference Board of Canada

4.0 Direct Economic Impact on Canada's Indigenous Tourism Sector in 2021

This chapter presents the potential direct impact of COVID-19 on the Indigenous tourism sector's economic footprint in 2021. To estimate the negative impact of COVID-19 in 2021, we incorporate insights from over 670 operators surveyed in 2021 and 2020, along with other industry-specific information and economic models maintained by The Conference Board. In assessing the negative impact, the closest counterfactual we have in terms of a non-COVID-19 world is 2019. Our updated 2019 estimates therefore serve as the basis of comparison for understanding relative sector performance under COVID-19 conditions.⁴ A summary of national and provincial/territorial economic impacts is presented in Appendix C, while overall high-level impacts are discussed in this chapter.

Direct Economic Impact of COVID-19

Based on the insights of operators and other sector-specific information, it is projected that the Indigenous tourism sector's overall footprint remains considerably diminished in 2021 compared to 2019. But compared to 2020, the sector also appears to be experiencing a moderate rebound as vaccination rates increase and restrictions ease. The table below summarizes key measures for the sector's economic footprints in 2019 (revised), 2020 (revised), and 2021.

Table 4.1
Economic footprint of the sector in 2019, 2020, and 2021

	Revenue (\$ Million)	GDP (\$ Million)	Employment (Jobs)	Wages (\$ Million)
2019 (revised)	3,971	1,782	36,700	1,100
2020 (revised)	1,235	555.1	11,917	354
2021	1,720	774.2	18,043	521

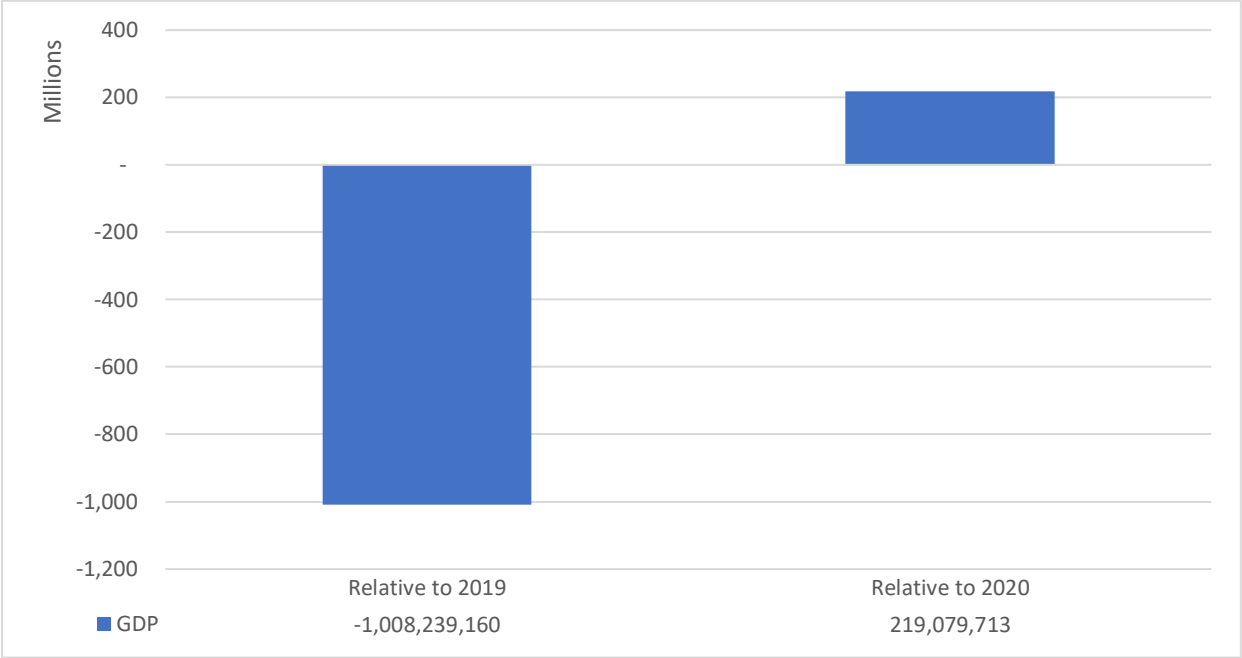
Source: The Conference Board of Canada

Our estimates indicate that relative to 2019, the revenues and GDP attributed to the sector will be down by 57 per cent, while employment and wages will be down by 51 and 53 per cent

⁴ As mentioned in chapter 2, the 2019 and 2020 Indigenous tourism sector footprints are revised based on ITAC's updated 2021 inventory of Indigenous tourism businesses.

respectively. In terms of GDP that change amounts to a loss of more than \$1 billion. (See Chart 4.1.)

Chart 4.1
GDP growth in 2021 relative to 2019 and 2020
(Change in GDP across Canada relative to 2019 and 2020, \$ CAD)

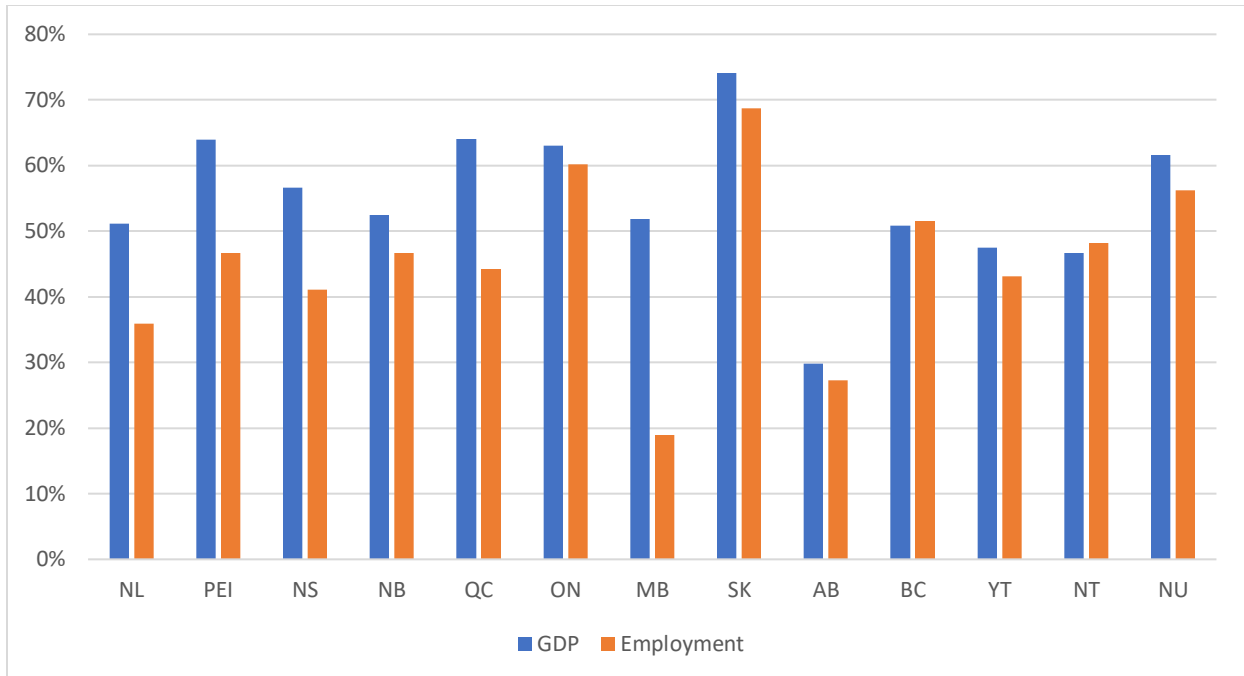


Source: The Conference Board of Canada

Impacts by Province and Territory

Unpacking the 2021 impacts on GDP and employment relative to 2019, almost all provinces and territories could face more than 50 per cent losses in GDP, with the impact being even more significant for some provinces. (See Chart 4.2.) On employment losses, 10 provinces and territories would face losses larger than 40 per cent, with Saskatchewan, Ontario, and Nunavut being the most severely impacted. Detailed impacts are provided in Appendix C.

Chart 4.2
Provincial/territorial level impacts of COVID-19 in 2021
(Decline in GDP and employment across provinces from 2019, Per cent)

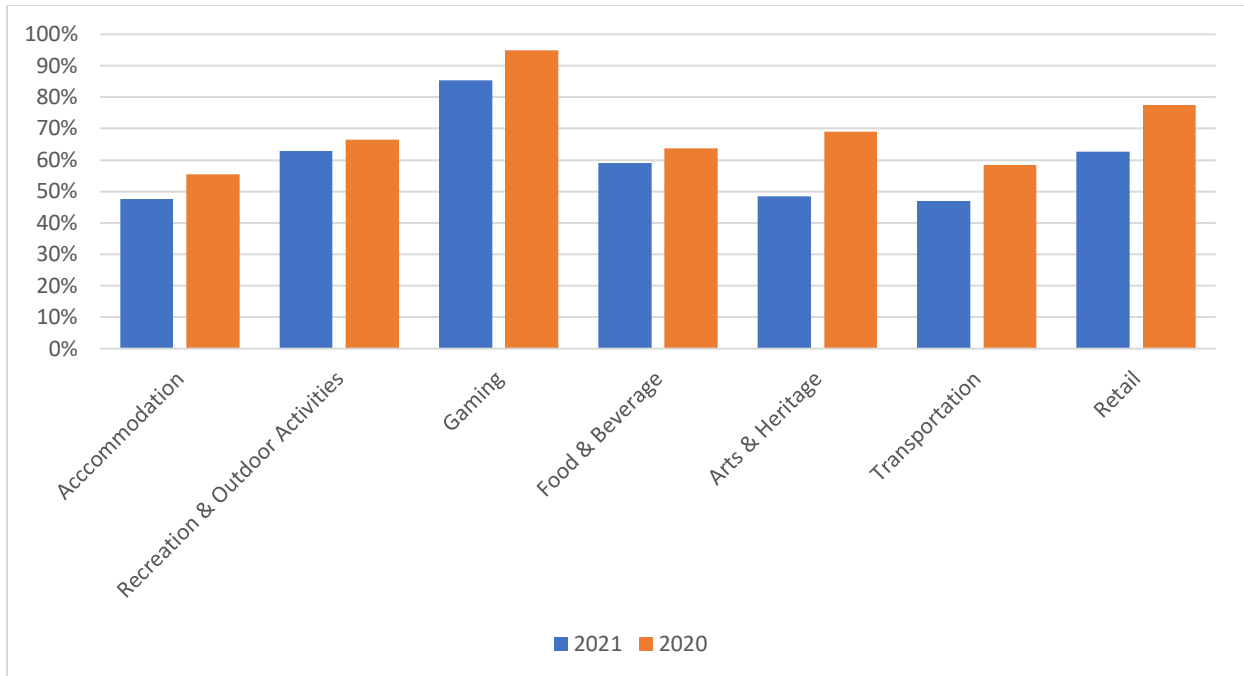


Source: The Conference Board of Canada

Impacts by Tourism Industry Domain

Unpacking the impact on GDP by tourism industry domain, we find that gaming, recreation and outdoor activities, and retail stand out as the hardest hit, followed by food and beverage. These domains were also hit hard in 2020. (See Chart 4.3.)

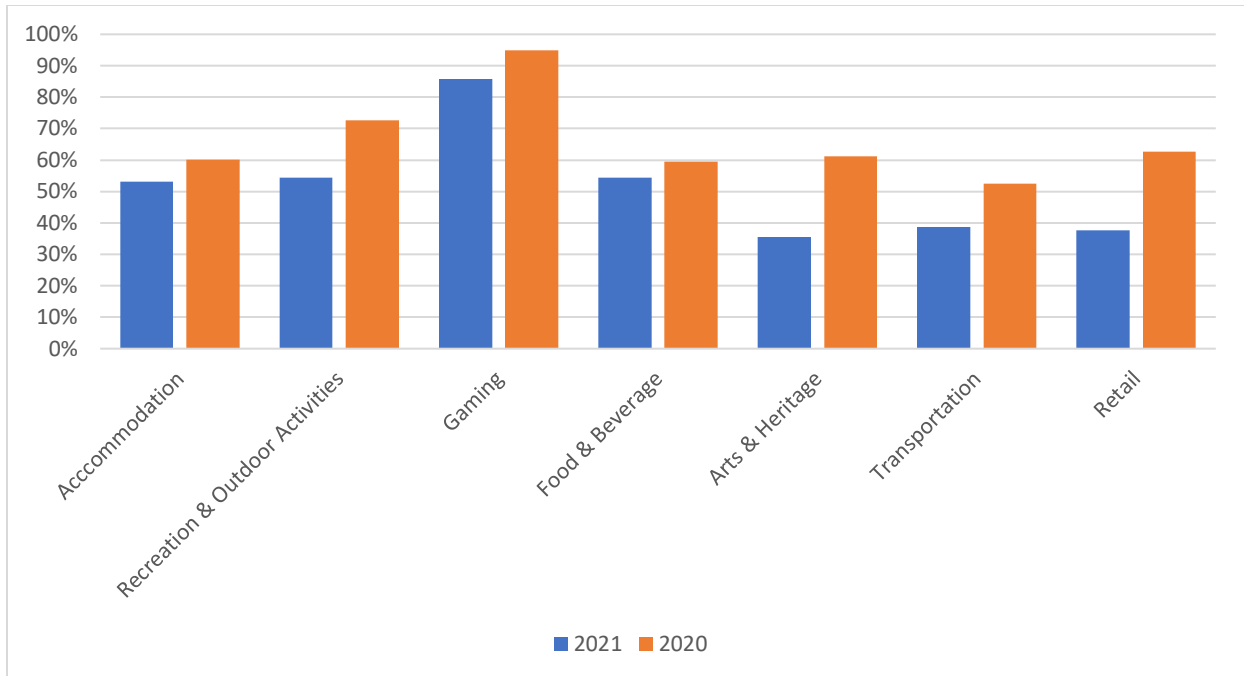
Chart 4.3
Impact of COVID-19 on GDP, by industry domain
 (Decline in GDP from 2019, Per cent)



Source: The Conference Board of Canada

In 2021, the gaming, food and beverage, and recreation and outdoor activities domains are expected to have the greatest employment losses relative to 2019. These three domains were also among the hardest hit in 2020. (See Chart 4.4.)

Chart 4.4
Impact of COVID-19 on employment, by industry domain
 (2021 employment levels relative to 2019)

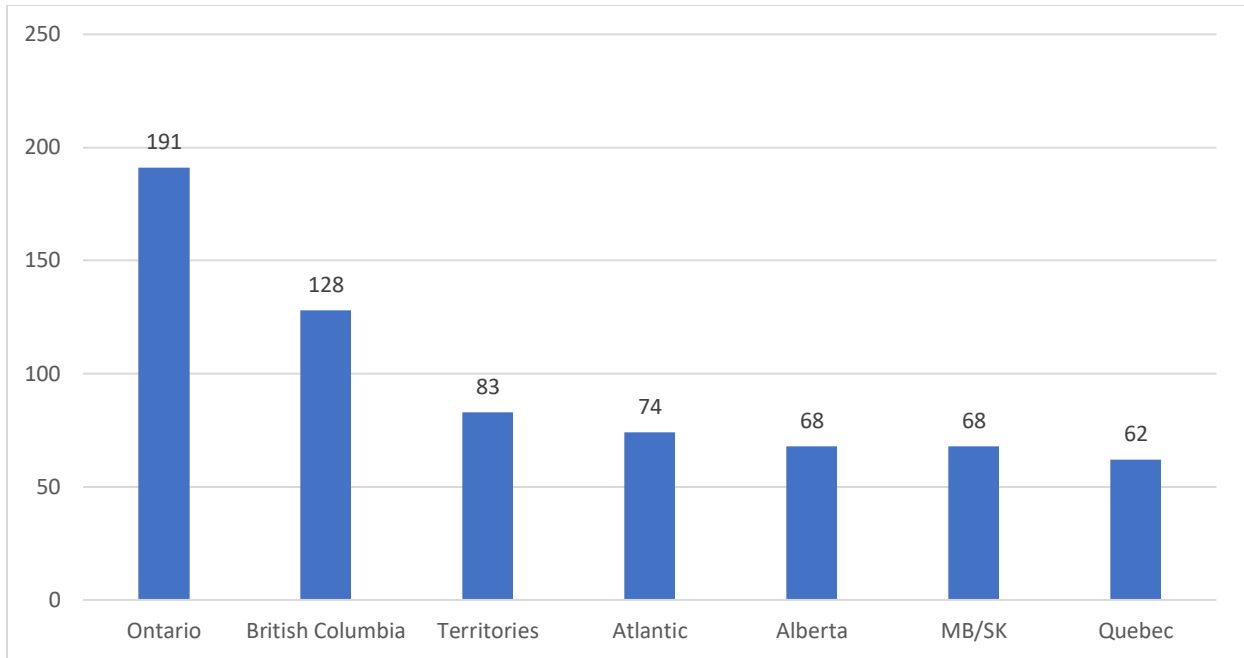


Source: The Conference Board of Canada

Permanent Business Closures

As a result of the hit on revenues and GDP, many businesses could be facing the possibility of permanent closure. Our estimates indicate that because of COVID-19, 674 businesses across the sector are at high risk of permanent closure in 2021-2022. Ontario and British Columbia would be the regions most impacted in terms of estimated business closures. (See Chart 4.5.)

Chart 4.5
Impact of COVID-19 on business operations
 (Number of businesses that could permanently close)



Source: The Conference Board of Canada

5.0 Conclusion

ITAC’s strategic vision for Indigenous tourism anticipates that by 2024 the Canadian GDP impact of Indigenous tourism operators will increase to \$1.9 billion; and the Indigenous tourism workforce will increase to 49,000. While our pre-COVID era assessments suggest the sector has been steadily advancing towards these goals, our estimates of COVID-19’s impacts in 2020 and 2021 portray a sector in crisis.

In 2021, ITAC and its Provincial/Territorial Indigenous partners continue to engage with Indigenous stakeholders and federal and provincial/territorial governments to establish a plan and ongoing stimulus for sector recovery⁵. As we learned from the 346 respondents to our in-depth 2021 survey, Indigenous tourism operators continue to worry about immediate needs such as maintaining liquidity and core staffing under extreme losses and threats of closure.

Though clouded by continuing uncertainty, the sector’s path to recovery and renewal will undoubtedly require a series of tailored policy responses to best address the vastly different realities of its diverse businesses – from the independent sole-proprietors to the not-for-profit

⁵ See: Indigenous Tourism Association of Canada, “Forward Together: A Strategic Recovery Plan For The Indigenous Tourism Industry in Canada 2020-2024.”

heritage associations, community-based organizations, and incorporated air carriers, casinos, and resorts.

Appendix A – Bibliography

Fiser, Adam and Gregory Hermus. Canada's Indigenous Tourism Sector: Insights and Economic Impact, The Conference Board of Canada, May 2019.

Indigenous Tourism Association of Canada. "Forward Together: A Strategic Recovery Plan For The Indigenous Tourism Industry in Canada 2020-2024," May 2020.

The Conference Board of Canada. The Impact of COVID-19 on Canada's Indigenous Tourism Sector: Insights from Operators, custom report for the Indigenous Tourism Association of Canada, June 15, 2020.

Appendix B – Revised Inventory

Since the release of its 2014–15 study, ITAC has continued to develop and refine its 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 be able to demonstrate a connection and responsibility to the local Indigenous community and traditional territory where the operation resides.

The first impact assessment developed by The Conference Board of Canada for ITAC in 2018-2019 included 1,875 businesses.⁶ Our second assessment, developed in 2020, eliminated 176 businesses from the previous inventory which reduced the total number to 1,699. The 2020 revisions, made at the behest of ITAC staff and Provincial/Territorial Indigenous partners, mainly reflect a narrower definition of the tourism sector. This definition, carried forward into 2021, excludes two industry subsectors previously estimated in 2018-2019 as part of retail, namely Indigenous-owned gasoline stations and general merchandise stores. It is intended to focus our assessment on the Indigenous tourism sector's core businesses.

For our 2021 impact assessment, The Conference Board collaborated with ITAC staff and its Provincial/Territorial Indigenous partners over six months to further revise and update the inventory. From 1,699 businesses in 2020, the inventory has now grown to 1,889. However, in the process, 292 of the 2020 inventory's businesses were eliminated, and 482 new businesses were included. In particular, the retail domain has noticeably grown while the transportation domain has noticeably shrunk. (See Table B.1). Among the most impactful changes was the decision by ITAC and the Yukon First Nations Culture & Tourism Association (YFNCT) to remove Air North. These changes then led us to revise our previous 2019 and 2020 impact assessments based on the 2021 inventory.

Despite the revisions that have occurred between 2018 and 2021, the inventory's distribution of businesses across industry domains and geographic regions has remained relatively consistent. Though as noted previously, the changes to retail and transportation should be kept in mind. See Tables B.1 and B.2.

Table B.1 **Distribution of businesses across ITAC's tourism industry domains**

⁶ Fiser, Adam and Gregory Hermus. Canada's Indigenous Tourism Sector: Insights and Economic Impact, The Conference Board of Canada, May 2019.

(Proportion of businesses in 2021 and 2018-2019 inventories)

Domain	Inventory	
	2021	2018-2019
Accommodation	22.1%	18.3%
Arts & Heritage	28.4%	27.6%
Food & Beverage	9.3%	8.5%
Gaming	1.8%	1.9%
Other	6.0%	4.0%
Recreation & Outdoor Activities	15.4%	13.4%
Retail	11.3%	6.4%
Transportation	5.7%	19.9%
Total N.	1,889	1,875

Source: The Conference Board of Canada

Table B.2

Distribution of businesses across provinces and territories

(Proportion of businesses in 2021 and 2018-2019 inventories)

Domain	Inventory	
	2021	2018-2019
AB	7%	9%
BC	18%	19%
MB	5%	6%
NB	3%	3%
NL	4%	5%
NS	2%	1%
NT	5%	5%
NU	6%	3%
ON	30%	25%
PEI	1%	1%
QC	11%	13%
SK	5%	4%
YT	4%	4%
Total N.	1,889	1,875

Source: The Conference Board of Canada

Appendix C Model Results

Table C.1
Economic footprint of the Indigenous tourism sector in 2021
 (With COVID-19 impact)

Province	Revenue (\$)	GDP (\$)	Employment (Jobs)	Wages (\$)
NL	48,053,977	26,219,112	658	18,943,463
PEI	2,833,896	1,713,309	88	1,165,306
NS	9,180,792	5,744,795	207	3,730,274
NB	56,310,439	17,895,366	548	11,593,714
QC	190,532,192	103,819,954	2,697	66,095,664
ON	473,825,166	196,474,583	4,566	133,329,605
MB	65,073,054	29,895,625	912	22,675,602
SK	52,563,362	27,457,083	852	19,200,326
AB	279,525,229	116,382,642	1,979	81,857,969
BC	202,917,222	105,016,928	2,861	67,522,724
YT	33,371,956	15,737,492	469	10,553,544
NT	186,320,670	78,655,332	1,487	46,315,543
NU	119,321,945	49,205,813	718	37,700,868
Canada Total	1,719,829,899	774,218,033	18,043	520,684,603

Source: The Conference Board of Canada

Table C.2
COVID-19 impact on the sector
 (Per cent decline from 2019)

Province	Revenue	GDP	Employment	Wages
NL	55%	51%	36%	46%
PEI	65%	64%	47%	51%
NS	56%	57%	41%	50%
NB	52%	52%	47%	49%
QC	64%	64%	44%	46%
ON	63%	63%	60%	63%
MB	52%	52%	19%	23%
SK	78%	74%	69%	78%
AB	31%	30%	27%	24%
BC	53%	51%	52%	50%
YT	49%	48%	43%	42%
NT	43%	47%	48%	43%
NU	60%	62%	56%	59%
Canada Total	57%	57%	51%	53%

Source: The Conference Board of Canada

Table C.3**Number of Businesses that could close permanently in 2021-2022 as a result of COVID-19**

	Territories	BC	AB	MB/SK	ON	QC	Atlantic	Canada
Accommodation	25	32	13	14	19	23	16	142
Recreation & Outdoor Activities	23	18	8	14	29	7	3	102
Gaming	0	0	1	1	1	0	1	4
Food & Beverage	0	7	2	5	32	2	6	54
Arts & Heritage	25	40	32	25	58	14	35	229
Retail	2	13	4	5	26	11	7	68
Other	2	8	5	1	16	4	2	38
Transportation	6	10	3	3	10	1	4	37
Total	83	128	68	68	191	62	74	674

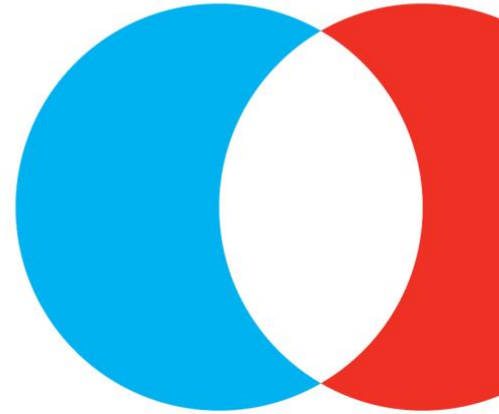
Source: The Conference Board of Canada

Appendix D: Methodology

Our modelling process made use of combined 2020 and 2021 business survey data to profile the overall Indigenous tourism sector's footprints since 2019. Employment and revenue data for 673 out of the revised inventory's 1,889 indigenous tourism businesses were used alongside other relevant industry information. The insights from surveyed businesses form an important basis for our assessment of COVID-19's economic impacts in Chapter 4. In our judgment, the survey data are sufficiently representative of the overall Indigenous tourism sector's evolution since 2019; however, as with all surveys, certain cautions still apply at both a geographic and industry level.

To ease the modelling process, survey respondents were aggregated by province/territory, and at a broader industry level using ITAC's nine industry domains built up from 42 industry subsectors used to represent the sector. This provided for more robust representativeness and, conversely, less areas where national level responses had to be used. Expert judgement was used to assess those instances where reported data from the surveys were too few in absolute or percentage terms to represent an industry domain and/or province/territory. In most instances where this arose (limited domain-specific responses by region), it meant that we used the national level results for that industry domain.

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