Indigenous Tourism in Canada

Keith Henry, President & CEO
Indigenous Tourism Association of Canada
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Membership base of Indigenous owned and controlled businesses.</td>
<td>13 elected board members representing industry from across Canada.</td>
</tr>
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</table>
Our Mission

To provide leadership in the development and marketing of authentic Indigenous tourism experiences through innovative partnerships.

Our Vision

A thriving Indigenous tourism economy sharing authentic, memorable and enriching experiences.
Five Year Plan
2016-2021

Four Strategic Pillars

- Development
- Marketing
- Leadership
- Partnership
Measurable Goals to Achieve by 2021

Increase Indigenous tourism revenues from $1.4 billion in annual Canadian GDP to $1.7 billion ($300 million increase).

Increase Indigenous tourism jobs from 33,100 to 40,233 (7,133 increase).

Increase total export-ready Indigenous tourism businesses from 80 to 130 (50 increase).
Unprecedented Results

Only three years into The Path Forward, ITAC exceeded targets for our three priority goals.
<table>
<thead>
<tr>
<th></th>
<th>2014 Status</th>
<th>2021 Target</th>
<th>2017 Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indigenous Tourism Revenues in Annual Canadian GDP</td>
<td>$1.4 billion</td>
<td>$1.7 billion</td>
<td>$1.7 billion</td>
</tr>
<tr>
<td>Indigenous Tourism Jobs</td>
<td>33,112</td>
<td>40,233</td>
<td>39,036</td>
</tr>
<tr>
<td>Export-Ready Indigenous Tourism Experiences</td>
<td>80</td>
<td>130</td>
<td>133</td>
</tr>
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Research Report

Canada’s Indigenous Tourism Sector: Insights & Economic Impacts
From 2014-2017, tourism across Canada grew by an estimated 14.5%

Indigenous tourism outpaced “mainstream” tourism industry growth with an estimated 23.5% growth during same period.
Unprecedented Demand

Demand for Indigenous tourism in Canada continues to exceed expectations as more international visitors seek authentic experiences.
1 in 3 international visitors to Canada are interested in Indigenous tourism experiences (37%).

Visitors from France (63%) and Germany (47%) are most likely to be interested in Indigenous tourism experiences.

The USA (33%) and China (35%) offer the largest potential market opportunities in terms of potential visitation.
Unprecedented Opportunity

The time is right to accelerate the growth of Indigenous tourism in Canada through new investment in ITAC’s four strategic pillars.
Accelerating Indigenous Tourism Growth in Canada

2019-2024

An update to the ITAC Five Year Plan.
## New Targets for 2024

<table>
<thead>
<tr>
<th>Category</th>
<th>Target</th>
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<tbody>
<tr>
<td>Indigenous Tourism Revenues in Annual Canadian GDP</td>
<td>$2.2 billion</td>
</tr>
<tr>
<td>Indigenous Tourism Jobs</td>
<td>49,383</td>
</tr>
<tr>
<td>Export-Ready Indigenous Tourism Experiences</td>
<td>200</td>
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Updated plan calls for new investments in:

<table>
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<tr>
<th>Culinary Tourism</th>
<th>Artisan Authenticity</th>
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<tbody>
<tr>
<td>Micro-grant Program</td>
<td>Marketing</td>
</tr>
<tr>
<td>Photo &amp; Video Assets</td>
<td>Airports &amp; Cruise Ship Terminals</td>
</tr>
<tr>
<td>Provincial/Territorial Support</td>
<td>Research</td>
</tr>
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</table>
Support to grow provincial or territorial Indigenous tourism associations.

Support for ITAC to continue momentum.

Investment: $72M over 5 years.

<table>
<thead>
<tr>
<th>Year</th>
<th>Investment</th>
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<tr>
<td>2019-2020</td>
<td>$13,811,500</td>
</tr>
<tr>
<td>2020-2021</td>
<td>$14,293,960</td>
</tr>
<tr>
<td>2021-2022</td>
<td>$14,381,718</td>
</tr>
<tr>
<td>2022-2023</td>
<td>$14,649,987</td>
</tr>
<tr>
<td>2023-2024</td>
<td>$14,923,987</td>
</tr>
<tr>
<td></td>
<td>$72,061,152</td>
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</table>
Partnerships to Grow Indigenous Tourism

What do we know about Indigenous tourism in Canada?

What is authentic Indigenous Tourism and how does ITAC define ownership?

Why would you want to partner with Indigenous or non-Indigenous operators?

Tips to being a good partner.
What does Indigenous Tourism in Canada look like?
Only three years into *The Path Forward* — our current 5-year plan — ITAC has already exceeded overall targets for our three priority goals.
Demand for Indigenous tourism in Canada continues to exceed expectations as more international visitors seek authentic experiences.
National Guidelines

PLANNING
You are just starting to think about an Indigenous tourism business.

VISITOR-READY
You have an Indigenous tourism business and wish to improve or expand.

MARKET-READY
You have a market ready business and wish to work with the trade or other partners.

EXPORT-READY
You want to learn more about Indigenous tourism and the tourism industry.
Authenticity — the Heart of Indigenous Tourism.
Culture belongs to the Community.
Diversity of Indigenous communities means there is no universal truth.
Why Authenticity matters.
Indigenous Tourism is by Indigenous peoples, not about Indigenous peoples.
Visitors want connection.
Visitors want unique experiences.
Visitors want personal perspectives.
Indigenous Tourism Protocols.
51% Indigenous owned & controlled.
Knowledge from the keepers.
Indigenous content led by Indigenous people.
Protecting culture while supporting community.
Connect with Elders.
Create positive economy.
Protect sacred places.
Bridging the Gap: Introducing Visitors to your Culture.
Define your guest code of conduct.
Allow guests to access information about your culture.
Include culture wherever possible.
Powerful Partnerships.
8 Provincial & Territorial Indigenous Tourism Operators
5 Provincial & Territorial Indigenous Tourism Working Groups

- Northwest Territories
- Saskatchewan
- Manitoba
- Newfoundland & Labrador
- Prince Edward Island
International Partners

WINTA
World Indigenous Tourism Alliance

AIANTA
American Indian Alaska Native Tourism Association
<table>
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<tr>
<th>Why partner with an Indigenous operator?</th>
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<tbody>
<tr>
<td>Set yourself apart in the market</td>
</tr>
<tr>
<td>Add cultural content</td>
</tr>
<tr>
<td>Corporate social responsibility</td>
</tr>
<tr>
<td>Visitor demand</td>
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Tips for being a Good Partner.
Create a meaningful partnership.

Build a relationship without a timeline.

Be open — come without expectation.

Commit to sharing.
Know what you bring to the partnership.

<table>
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<tr>
<th>New ideas</th>
<th>New location</th>
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<tr>
<td>New customers</td>
<td>Mutual benefits</td>
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How you compliment each other
Relinquish Control

Understand that Indigenous people are in control of their own stories.

Respect autonomy of Indigenous experience being shared.
DEVELOPMENT
Microgrant Program

Distributing $273,000 in 2019 to 55 businesses in 12 provinces & territories.

138 Applications

$1.35M in Requests
National Guidelines

Developing Authentic Indigenous Experiences in Canada.

Steps to insure authenticity is being delivered. | Checklists for assessing and developing business against industry standards.
Push for Export-Readiness

Development program to help increase the number of export-ready businesses.
Indigenous Tourism Strategies

Saskatchewan

Atlantic Canada
Indigenous Culinary

Our marketing and development programs will have a focus on Indigenous culinary.
National Indigenous Tourism Fund

National fund for financing significant Indigenous tourism projects.

Access to capital.
Membership
2019-2020

A 58% increase since last year.

258 Market-Ready | 112 Marketing Upgrade
83 Non-Market-Ready | 217 Industry Partners
MARKETING
Consumer Website

96,800 unique visitors

267,397 pageviews

2min 13s average time on site

130,600 sessions
Launching Our Updated Travel Packages Website

Selling Indigenous travel itineraries direct to consumers.
Online Booking

Adding functionality to our travel packages site to allow consumers to book online.
Social Engagement

Connecting with users from across the world over multiple platforms.
Indigenous Tourism
Lifestyle Magazine

Published and distributed a lifestyle magazine featuring 112 Marketing Upgrade Indigenous tourism experiences from across the country.
Canadian Signature Experiences Collection Booklet

Featuring 12 Canadian Indigenous Tourism Experiences across Canada.

In Partnership with
Connecting America Campaign

In partnership with Destination Canada.

9.3M+ reach | 525K+ engagement

4 mins+ on content | 300% fan growth
Destination Indigenous Campaign

New international and domestic campaign targeting niche travellers.
Brand Guidelines for Photography

A small guide explaining image context, usage rights and how to make the better use of your images.
2019-20 Photo Subsidy Program

If your business is an Indigenous Tourism Association of Canada (ITAC) member that has purchased the optional Marketing Upgrade, ITAC will reimburse up to $500 of the cost of professional photos of the experiences available at your tourism business. This amount should go towards the costs of a professional photographer for one day, and include an image bank of between 20-25 high resolution photos.

All photos must be rights-free, made available for ITAC’s use, and created according to the standards outlined in ITAC’s Brand Guidelines for Photography. It should be noted that these photos will be jointly owned by ITAC and your business.

Photography Guidelines
Photos bring stories to life, but the choices that we make when we visually represent our communities can have far-reaching effects; going beyond just showing what we do, to shaping how we are perceived. ITAC’s board aims to tell many different stories, encompassing the diversity of Indigenous nationhood which thrives across Canada. By moving beyond stereotypical photos of Indigenous peoples “stuck” in history we can show our communities as they really are: diverse, authentic, empowered and current.

Deadline
This program is open from April 1, 2019 to March 31, 2020. All applications for the subsidy, accompanied by the photographer’s receipt and a downloadable link for the photos, must be received by ITAC prior to March 31, 2020.

For additional information, please contact:
Sébastien Desjardins-Picard
Director of Marketing, Indigenous Tourism Association of Canada
418-465-0210
Sebastien@IndigenousTourism.ca
CrowdRiff

Gathering user-generated content from social media users tagging Indigenous tourism experiences.
Video Content

WESTJET

NATIONAL GEOGRAPHIC

DESTINATION CANADA
Public Service Announcement Video Campaign

Development of 5 PSA that will be showcase across Canada in more than 5 million Canadian households.
68 delegates in the Indigenous pavilion, 43 businesses representing all 13 provinces and territories.
Showcase Asia

Over 790 meetings in the Indigenous pavilion, with 9 businesses representing 4 provinces and territories.
Interactive Sales Tool

A new way of presenting our Marketing Upgrade Indigenous experiences to the travel trade and media.
Earned Media Stories

Generating and facilitating over 100 travel media stories about Indigenous tourism experiences.
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