Indigenous Tourism in Canada

Keith Henry, President & CEO
Indigenous Tourism Association of Canada
The Parties shall provide one another with Reciprocal memberships to their associations.

The Parties shall undertake reasonable efforts to make their memberships aware of one another’s associations, the benefits of membership and promotion of events, at no cost charge or expense to each other.

The Parties shall provide at no cost, charge or expense to one another, agencies conference admission/registration for one attendee at which and during which a representative may attend, promote each other’s programs and new opportunities for networking.

The Parties may provide the opportunity for a representative to serve as a speaker at their annual conference. A speaker’s fee will not be charged by either association.

The Parties may investigate and jointly develop and execute a mutually beneficial series of educational programming to be presented in an agreed upon multi-platform format.

The Parties shall seek opportunities to collaborate on mutually beneficial advocacy initiatives.

The Parties shall, at no cost, charge or expense to one another, be designated by each other as a “Strategic or Industry Partner.”

The Parties shall provide, at no cost charge or expense to one another, a hyperlink to the each other’s website from their website.
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>Category</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>
</tbody>
</table>

*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.
2019-2024

Accelerating Indigenous Tourism Growth in Canada

An update to the ITAC Five Year Plan.

New Targets for 2024

<table>
<thead>
<tr>
<th>Category</th>
<th>Target</th>
</tr>
</thead>
<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>
</tr>
</tbody>
</table>
Updated plan calls for new investments in:

<table>
<thead>
<tr>
<th>Culinary Tourism</th>
<th>Artisan Authenticity</th>
</tr>
</thead>
<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>
</tbody>
</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>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

$72,061,152
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**

<table>
<thead>
<tr>
<th>PLANNING</th>
<th>VISITOR-READY</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are just starting to think about an Indigenous tourism business.</td>
<td>You have an Indigenous tourism business and wish to improve or expand.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MARKET-READY</th>
<th>EXPORT-READY</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have a market ready business and wish to work with the trade or other partners.</td>
<td>You want to learn more about Indigenous tourism and the tourism industry.</td>
</tr>
</tbody>
</table>
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

National Partners

Parks Canada
Parcs Canada
DESTINATION CANADA

Tourism Industry Association of Canada
Association de l’industrie touristique du Canada

Tourism HR Canada
RH Tourisme Canada
Why partner with an Indigenous operator?

Set yourself apart in the market
Add cultural content
Corporate social responsibility
Visitor demand
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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market-Ready</td>
<td>258</td>
</tr>
<tr>
<td>Marketing Upgrade</td>
<td>112</td>
</tr>
<tr>
<td>Non-Market-Ready</td>
<td>83</td>
</tr>
<tr>
<td>Industry Partners</td>
<td>217</td>
</tr>
</tbody>
</table>
### Consumer Website

<table>
<thead>
<tr>
<th>Visits</th>
<th>Average Time on Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>96,800 unique visitors</td>
<td>2min 13s average</td>
</tr>
<tr>
<td>267,397 pageviews</td>
<td>130,600 sessions</td>
</tr>
</tbody>
</table>
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 Destination Canada

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.

DIGITAL ASSETS
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 you are a member of the Indigenous Tourism Association of Canada (ITAC) and you purchase the optional Asset Subsidy Program, you will receive a 25% subsidy on the cost of professional photos of the experiences available at your tourism business. This option is designed to assist the cost of professional photographers for you and fellowize an image bank of 36-40 high-resolution photos.

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

Photograph Guidelines

Professional images are key, the choice that we make when we visually represent our communities can have far-reaching effects. Improving print and sharing online what we do is shaping how we are perceived.

ITAC’s brand seeks to reflect a sense of culture, embracing the diversity of Indigenous cultural and traditional practices. Indigenous peoples “face” in history was once about our communities as they really are. Authentic, prominent, and current.

Deadline

This program (open from April 1, 2019 to March 31, 2020) all applications for the subsidy accompanied by the photographs (except the s) and a written letter for the photos, must be received by ITAC prior to March 31, 2020.

Asset Subsidy Program

Providing support to our Marketing Upgrade members to obtain new high-quality images.
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.
Rendez-Vous
Canada 2019

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.

Indigenous Tourism in Canada

Keith Henry, President & CEO
Keith@IndigenousTourism.ca
Indigenous Tourism Association of Canada