



Strengthening Canada's Indigenous Tourism Sector

Evaluation of the
Northern Tourism
Recovery Incubator
Program



Partners



The Diversity Institute conducts and co-ordinates multi-disciplinary, multi-stakeholder research to address the needs of diverse Canadians, the changing nature of skills and competencies, and the policies, processes and tools that advance economic inclusion and success. Our action-oriented, evidence-based approach is advancing knowledge of the complex barriers faced by equity-deserving groups, leading practices to effect change and producing concrete results.



The Future Skills Centre (FSC) is a forward-thinking centre for research and collaboration dedicated to driving innovation in skills development so that everyone in Canada can be prepared for the future of work. We partner with policy makers, researchers, practitioners, employers and labour, and post-secondary institutions to solve pressing labour market challenges and ensure that everyone can benefit from relevant lifelong learning opportunities. We are founded by a consortium whose members are Toronto Metropolitan University, Blueprint, and The Conference Board of Canada, and are funded by the Government of Canada's Future Skills program.



The Indigenous Tourism Association of Canada (ITAC) is the lead organization tasked with growing and promoting the Indigenous tourism industry across the country. Inspired by a vision for a thriving Indigenous tourism economy sharing authentic, memorable and enriching experiences, ITAC develops relationships with groups and regions with similar mandates to enable collective support, product development, promotion and marketing of authentic Indigenous tourism businesses in a respectful protocol.

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Executive Summary



Before the COVID-19 pandemic, the Indigenous tourism sector in Canada was rapidly expanding, significantly contributing to economic development and job creation. The pandemic reduced the sector's gross domestic product (GDP) footprint by nearly 69% in 2020 as compared to its 2019 peak. Although there were signs of recovery in 2021, there is still a long way to go to reach pre-pandemic levels.

Tourism remains a crucial economic driver for Northern Canada with benefits that extend beyond monetary gains. It fosters values that Indigenous communities have safeguarded for generations. It advances Indigenous community development, empowers communities, promotes wellness, and encourages cultural learning and environmental stewardship. Targeted recovery efforts are therefore essential to ensure the long-term well-being and development of Indigenous communities in the region.

The Northern Recovery Incubator (NRI) program, funded by the Future Skills Centre and led by the Indigenous Tourism Association of Canada (ITAC) in collaboration with the Diversity Institute at the Ted Rogers School of Management, aimed to revitalize

Indigenous tourism in Northern communities and facilitate sustainable growth. Program objectives included supporting 100 Northern Indigenous tourism businesses to achieve a greater level of market readiness through needs assessments, in-person learning and networking, and targeted business and marketing support. Another objective was to produce insights into effective program elements to inform future practices and policies.

Running from September 2022 to December 2023, the NRI program included five main activities. Among these was recruitment of businesses to undergo a needs assessment by the Original Original Accreditation Program, which provides a standard and mark of excellence for tourism operators. The activities also included coordination of the International Indigenous Tourism Conference (IITC), the provision of supports and resources for eligible businesses, and the marketing of Indigenous businesses through ITAC's networks. Finally, the program's effectiveness was evaluated through a post-programming survey. Results from the needs assessment and a post-conference survey about the IITC are also included in this report.

The program engaged 103 Indigenous tourism businesses in the needs assessment phase, slightly exceeding its recruitment targets. This phase involved a 15-minute evaluation survey to assess businesses' readiness for accreditation in community engagement and support; visitor experience; health, safety and comfort; sustainable Indigenous tourism; marketing and visitor services; and business acumen or practices. By the end of the program, 57 businesses had received Original accreditation. The IITC, held in Winnipeg, Manitoba in March 2023, saw the participation of 76 businesses from the NRI program. Despite some logistical challenges and financial constraints affecting attendance,



*The program engaged **103 Indigenous tourism businesses** in the needs assessment phase.*

***57 businesses** had received Original accreditation.*

*The IITC, held in Winnipeg, Manitoba in March 2023, saw the participation of **76 businesses** from the NRI program.*

the conference provided a robust platform for learning, networking and collaboration. The business support phase offered tailored assistance to 52 Indigenous businesses, including up to \$10,000 in funding for improvements in areas identified in the needs assessment. Additionally, participants had access to digital marketing tools, resources and courses designed to enhance their online marketing.

The evaluation of the NRI program included a post-conference survey and post-programming survey. While the report includes the results of the 103 businesses' initial needs assessments, the followup assessment could not be included owing to privacy constraints. The confidentiality agreement requires that the information be used solely for the accreditation process. The post-programming survey aimed to capture participants' experiences and feedback across all program phases. The evaluation included open-ended and Likert scale questions. The data collected provided valuable insights, highlighting program strengths and areas for improvement. However, the results are limited due to a low response rate, as only 37 out of 103 participants completed the survey. Additionally, the reliance on self-reported data poses a limitation as it can be subjective.

The evaluation revealed several positive results, along with suggestions to strengthen program relevance, reach and impact. Participants generally viewed the NRI program positively, appreciating the business development support, networking opportunities and tailored assistance

provided. The needs assessment was effective in capturing business progress, but less so in identifying gaps. The IITC was highly valued for its networking and learning opportunities. Attendees appreciated the chance to connect with other tourism businesses, share experiences and explore new strategies for enhancing their operations. The business support phase was positively rated, with respondents noting that tailored support helped them meet market readiness standards. However, there were calls for additional funding and resources, particularly for essential equipment and financial literacy education. Some participants suggested more individualized support and one-on-one coaching. The responses indicate high overall satisfaction with the program, with 76% of respondents stating they were “extremely likely” to recommend ITAC to a friend or colleague.

The following recommendations were derived from the findings:

- > **Enhance communication and outreach**
Improve awareness and participation in all program stages by implementing more proactive and transparent information dissemination, simplifying messaging for broader accessibility and doing personalized outreach.
- > **Tailor support to diverse business needs**
Provide personalized assistance, such as dedicated consultants or guides, and create individualized development plans to address the needs of diverse Indigenous tourism businesses.

Recommendations derived from the findings



Enhance communication and outreach



Tailor support to diverse business needs



Improve the needs assessment process



Streamline financial support processes



Address broader business challenges



> **Improve the needs assessment process**

Revise the self-assessment questionnaire to capture better diverse business activities and needs, simplify language and ensure accessibility. Offer alternate methods for completion, such as paper-and-pencil versions, and develop a tailored assessment for small Northern tourism operators.

> **Streamline financial support processes**

Enhance the administration of financial support by implementing direct deposit options, providing clearer communication about the support process, and simplifying application and reimbursement procedures. Consider increased funding for travel to the IITC due to higher costs for those coming from the North.

> **Address broader business challenges**

Offer additional support in areas such as financial literacy, business forecasting and employee management to help businesses build resilience and adapt to market changes.

Introduction



Indigenous tourism operators were among the hardest hit businesses during the global COVID-19 pandemic. With borders closed, many Northern tourism businesses were left without visitors for extended periods. At the height of the pandemic in 2020, the Indigenous tourism sector's direct gross domestic product (GDP) footprint shrank drastically. Although there are signs of recovery, more effort is needed to return to the sector's 2019 peak.

To support full recovery, ambitious goals have been set by the Indigenous Tourism Association of Canada (ITAC) and organizations like Destination Canada. As part of these recovery efforts, the Future Skills Centre (FSC) funded the Northern Recovery Incubator (NRI) program, led by ITAC in collaboration with the Diversity Institute at the Ted Rogers School of Management.

Running from September 2022 to December 2023, the NRI program aimed to revitalize Indigenous tourism in Northern communities through an innovative approach to business incubation. It had three phases: a thorough needs assessment, in-person networking and tailored business supports to meet Canadian market standards and accelerate visitor and revenue recovery. In addition, ITAC enhanced the visibility of Indigenous businesses by featuring them in its marketing.

Businesses were recruited through ITAC and its provincial and territorial Indigenous tourism organizations (PTITO), a network of businesses owned by Indigenous Peoples across Canada.

Participating businesses' needs were assessed through the Original Original Accreditation Program (formerly known as RISE), which provides a standard and mark of excellence for tourism operators. The accreditation program offered individual businesses assessments and aggregated data to highlight business strengths and gaps to address before receiving full accreditation.

Following the assessment, businesses were invited to the International Indigenous Tourism Conference (IITC) in March 2023, offering valuable networking and learning opportunities.

Participants were eligible to receive up to \$10,000 in business supports to help them overcome gaps identified in the accreditation process. These funds were designated for improvements in six key areas: effective community engagement; excellence in visitor experience; ensuring health, safety and comfort; practising sustainable Indigenous tourism; excellence in marketing and visitor services; and demonstrating business acumen and practices. Additionally, participants had access to an exclusive suite of digital marketing tools, resources and courses designed to enhance their online marketing development and literacy.

The evaluation of the program was conducted primarily through a post-programming survey and post-conference survey.

The NRI program objectives were to support 100 Northern Indigenous tourism businesses in achieving greater market readiness through assessment, in-person learning at the IITC and targeted business support.



The program aimed to:



Improve business offerings to recover jobs and revenues lost due to the global COVID-19 pandemic



Produce insights into the most effective program elements and approaches



Inform implications for practices, programs and policies

The program also aimed to do as follows:

- > Improve business offerings to recover jobs and revenues lost due to the global COVID-19 pandemic
- > Produce insights into the most effective program elements and approaches
- > Inform implications for practices, programs and policies.

Due to privacy constraints, this report does not include the followup needs assessment for those who received accreditation from the Original Original. Without that data, its analysis should be interpreted with caution. While the results from the initial needs assessment are included, along with information on participants' perceptions of each phase of the program, the inability to track progress against the criteria provided in the baseline assessment prevents a more rigorous evaluation of the program's effectiveness over time.

Context



Before the COVID-19 pandemic, the Indigenous tourism sector was expanding at a much faster rate than was the overall Canadian tourism sector, contributing greatly to economic development and job creation. Between 2014 and 2017, the direct economic contributions (in terms of GDP) of the Indigenous tourism sector surged by 23.2%, compared to 12% growth in Canada's overall tourism activity.¹ Employment in Indigenous tourism businesses rose by 17.3%, significantly outpacing the 5.1% increase in the country's overall tourism employment.² By 2019, Indigenous tourism peaked, supporting nearly 37,000 jobs and generating about \$1.78 billion in direct GDP.³ Following the pandemic, however, the Indigenous tourism sector faced severe setbacks.

In 2021, the Conference Board of Canada and ITAC published a report on the status of the Indigenous tourism industry in Canada that examined the impact of the pandemic. In 2020, at the height of the pandemic, the sector's direct GDP footprint shrunk by almost 69% compared to 2019. Although there was a slight increase in GDP in 2021, signalling the beginning of recovery, the sector is still expected to experience a 57% reduction

in direct GDP from pre-pandemic levels. In 2021, the Indigenous tourism sector employed 18,000 individuals and contributed around \$774 million in direct GDP, well below pre-pandemic levels.⁴

Tourism is an important avenue for economic development in Northern Canada and is considered a favourable alternative to resource-extraction industries.⁵ It has far-reaching impacts on Indigenous communities beyond the economic benefits of job creation, sector diversification and income generation. By allowing communities to participate in decision-making, control resources and exercise rights over traditional lands, Indigenous tourism fosters self-reliance and reduces subordination. It also offers culturally relevant activities that renew and strengthen culture, contributing to overall community wellness. Moreover, tourism promotes community learning by providing opportunities for education and skills development, while Indigenous communities take on leadership roles in advancing their communities and environment. Managing land and resources in culturally informed ways enhances community stewardship and preserves traditional practices.⁶

Destination Canada has set an ambitious goal to increase tourism revenue from \$78.3 billion to \$105.1 billion by 2025, with \$1.9 billion coming from Indigenous tourism. One of its long-term strategies is ensuring “Indigenous Peoples have agency over the potential of tourism to enhance their lives.”⁷ The 2022 federal budget allocated \$20 million to aid in the long-term, sustainable recovery of the Indigenous tourism sector. From these funds, \$10 million has been designated for the micro and small business stream, which is being rolled out with ITAC to help Indigenous tourism businesses address barriers to their recovery and better position Canada as a global tourist destination.⁸

For its part, ITAC shares the goal of generating \$1.9 billion in direct GDP from the Indigenous tourism sector. Additionally, it aims to establish 1,900 Indigenous tourism businesses and create 40,000 Indigenous tourism jobs by 2025.



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ITACs 2022–2025 Strategic Plan outlines three priorities:

- > Inspiring ITAC member businesses across the country to rebuild or refocus their business through targeted support, education and training
- > Leveraging partnership opportunities and investments with the PTITO associations to maintain their membership and infrastructure
- > Strengthening ITAC as the national leader and advocate for Indigenous tourism operators, and stabilizing funding through the federal government, partners and membership.⁹

Program Design

Program objectives

The NRI program's implementation objectives were to do as follows:

- > Support 100 Northern Indigenous tourism businesses in achieving a greater level of market readiness through assessment, in-person learning at IITC and targeted business support
- > Improve the business offerings so Indigenous business can recover jobs and increase or recover revenues lost because of the COVID-19 pandemic
- > Produce insights into program elements and approaches that are most effective
- > Inform implications for practices, programs and policies.

NRI program objectives



Support 100 Northern Indigenous tourism businesses in achieving a greater level of market readiness



Improve offerings so Indigenous business can recover jobs and increase or recover revenues lost because of the COVID-19 pandemic



Produce insights into program approaches that are most effective



Inform implications for practices, programs and policies

To achieve these objectives, the program activities consisted of the following:

- > Recruiting businesses to undergo needs assessment via the Original Original Accreditation Program
- > Coordinating 100 delegates from Northern communities to attend the IITC in March 2023
- > Providing business supports and resources offered to 100 businesses
- > Featuring businesses through ITAC's platforms to enhance visibility within its network
- > Evaluating programming through a post-programming survey and post-conference survey.



Program activities

Recruitment of businesses for needs assessment

Based on standards set by Indigenous tourism operators, the Original Accreditation Program ensures consistent criteria for recognizing “market-ready” businesses that provide quality, authentic and safe visitor experiences. The program is essential for travel trade associations, tour operators, travel agents, Destination Canada, destination marketing organizations and local communities. It enables businesses to access travel trade networks and new markets.

Indigenous business applicants choose from three designations when applying:

- > **Business ready**
These are new startups and entrepreneurs focusing on good business practices and local markets.
- > **Visitor ready**
These are businesses attracting visitors beyond local markets, typically mature businesses with established operational policies.
- > **Export ready**
These are businesses targeting international markets, with the capacity to manage specialized travel trade services and maintain relationships with tour operators and destination marketing organizations.

The accreditation program evaluates businesses in six areas:

- > Community engagement and support
- > Visitor experience
- > Health, safety and comfort
- > Sustainable Indigenous tourism
- > Marketing and visitor services
- > Business acumen and practices

The needs of the businesses were assessed through a 15-minute evaluation survey, which is part of ITAC's regular accreditation process for Indigenous tourism businesses. Recruitment was carried out by ITAC and its PTITO partners, a nationwide network of Indigenous-owned tourism businesses. An Indigenous tourism business is defined by ITAC as an Indigenous-owned or controlled business (51% ownership) that offers a visitor experience that is either in development or market-ready.

For this initiative, ITAC collaborated with its PTITO partners to engage 100 businesses. A meeting was scheduled with PTITO members to discuss program parameters and establish participation goals for each province and territory in Canada's North. This included Nunavut, Yukon and the Northwest Territories, as well as the northern regions of British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Quebec, and Newfoundland and Labrador. As industry-based membership associations, ITAC and its PTITO partners anticipated that most participants would be association members; however, non-members could participate.



An Indigenous tourism business is defined by ITAC as an Indigenous-owned or controlled business (51% ownership) that offers a visitor experience that is either in development or market-ready.

In areas without a partnership, ITAC used its membership lists and those provided by the Conference Board of Canada to invite businesses to participate. Collectively, ITAC and PTITO represent more than 1,000 businesses across Canada. All of them were targeted for participation in the NRI program. Information was disseminated through industry newsletters and direct outreach.

Of the 103 Indigenous businesses that completed the needs assessment, 57 received accreditation by the end of the program. Due to the extensive nature of the process, however, some applications are still under review.

Coordination of the International Indigenous Tourism Conference

In-person connections hold profound significance for Indigenous communities, where relationships are deeply valued and often built on trust, mutual respect and shared experiences. These face-to-face interactions foster a sense of community and belonging that is integral to Indigenous cultures. For Indigenous tourism businesses, in-person networking allows connection with peers, industry leaders and potential partners, which fosters the exchange of ideas and best practices. Moreover, networking is essential for building relationships that can lead to collaborations, increased visibility and access to new markets. Engaging with a broader community helps businesses stay informed about industry trends, innovative strategies and emerging opportunities. These connections not only enhance professional networks but also reinforce Indigenous identity and community resilience, essential elements for the sustainable success of Indigenous tourism enterprises.

A key component of the NRI program's offerings was the 2023 IITC, which was hosted from March 8 to 10 on Treaty 1 Territory and the homeland of the Métis in Winnipeg, Man. Those who completed the self-evaluation would be eligible to attend the conference, with their airfare, accommodation and registration fees covered—a value of over \$4,000. The conference theme, Adventure to Understanding, aimed to bring together Indigenous cultures (First Nations, Inuit and Métis Peoples) and their unique stories.

The three-day event included cultural tours, keynote speakers, panel discussions and breakout sessions. It was also designed to support participants in growing their businesses, from those in development to those exploring export markets.

Business support and resources

Once the business owner completed the needs assessment, they were asked to go through an application process to leverage the business supports. After applying, they were to be contacted by a project team member from ITAC. This team member would then align business resources to address gaps identified in the assessment and assist with the accreditation process. A total of 52 businesses accessed this support, which made them eligible to access up to \$10,000 in available resources. These funds were designated for improvements in one or more of the six key areas evaluated in the needs assessment as previously noted.



Program participants also had access to an exclusive suite of digital marketing tools, resources and courses designed to enhance their development and literacy in online marketing. This comprehensive approach aimed to equip Indigenous tourism operators with the skills and resources necessary to thrive in a competitive market, ensuring they could meet Canadian market readiness standards and drive visitor and revenue recovery.

Marketing

Another key aspect of the program was the promotion of Indigenous businesses, ensuring that First Nations, Inuit and Métis tourism operators were represented accurately and respectfully. Through advertising campaigns, partnerships, travel trade and media relations, ITAC aimed to increase opportunities for its members and raise awareness of Indigenous tourism in key markets. Activities focused on Northern communities were designed to strengthen their businesses, rebuild operators and retrain staff to support visitors as the tourism sector recovered from the COVID-19 pandemic. Additionally, ITAC planned to engage its more than 72,000 followers on social media platforms like Facebook, Instagram and YouTube.

Since 2015 ITAC has partnered with Rendezvous Canada, Destination Canada's flagship event that is co-produced with the Tourism Industry Association of Canada (TIAC). This annual event, which rotates its host locations across the country, has been showcasing Canadian tourism for nearly 50 years.

It provides more than 1,500 international tourism leaders with an opportunity to meet one-on-one through pre-scheduled, mutually requested appointments. Through its Rendezvous Canada partnership, ITAC anticipated continuing to spotlight the growing interest in the Indigenous tourism sector, promote its members and build meaningful partnerships during and after the NRI program.

Evaluation surveys

Evaluation of the NRI program included a comprehensive post-programming survey for participants to share their experiences, identify strengths of the program and highlight areas for improvement. The survey aimed to capture a holistic view of the program's impact on Indigenous tourism businesses, offering valuable insights for future iterations. It evaluated key components such as the initial needs assessment; effectiveness of business support, training and development experiences, and networking opportunities; and overall program implementation. Demographic information, including intersectional identity, Indigenous group membership, years of operation, size of business, and annual sales and profits, was collected. Additionally, for the evaluation of IITC, a separate post-conference survey was disseminated to participants to assess the conference's effectiveness and identify areas for enhancement.

Program Implementation

Participation

Table 1 shows the number of participants in each component of the NRI program. The needs assessment phase slightly exceeded its recruitment targets, while attendance at the 2023 IITC and uptake of business supports fell short. Although these opportunities were offered to participants, some did not take advantage of them for reasons outlined below.

A total of 57 businesses received accreditation. Among these, about 54% were certified as export ready, about 39% as business ready and about 7% as visitor ready.

Program activities

Recruitment of businesses for needs assessment

The program slightly exceeded its recruitment target for the needs assessment, with 103 Indigenous tourism businesses completing the evaluation. This success was largely attributed to effective engagement with PTITO partners. Given concerns about varying literacy levels, a strategy for achieving this high level of participation was the use of personalized and simplified communications. This approach was particularly effective in outreach to Inuit communities.

TABLE 1

Number of Indigenous businesses participating per program activity/event

Activity	Number of Participants
Completed needs assessment	103
Accreditation received	57
Certified as business ready	22
Certified as visitor ready	4
Certified as export ready	31
Attended International Indigenous Tourism Conference	76
Received business supports (including marketing)	52

Coordination of the International Indigenous Tourism Conference

The 2023 IITC saw the participation of 76 northern Indigenous-owned businesses, which was below the target of 100. This can be attributed to logistical challenges at the program level and participants' individual circumstances. Financial constraints, long travel times, complications with hotel bookings and delays in travel reimbursements affected attendance. Despite these challenges, the conference's implementation remained comprehensive and beneficial. The event provided a robust platform for these businesses to engage in learning, networking and collaboration.

The conference featured a diverse array of sessions and activities designed to support the growth and development of Indigenous tourism operators. Attendees had the opportunity to connect with other tourism businesses, share experiences, and explore new ideas and strategies for enhancing their operations. Networking opportunities were integrated into the conference schedule, allowing attendees to establish valuable connections with local providers, potential collaborators and other small operators.



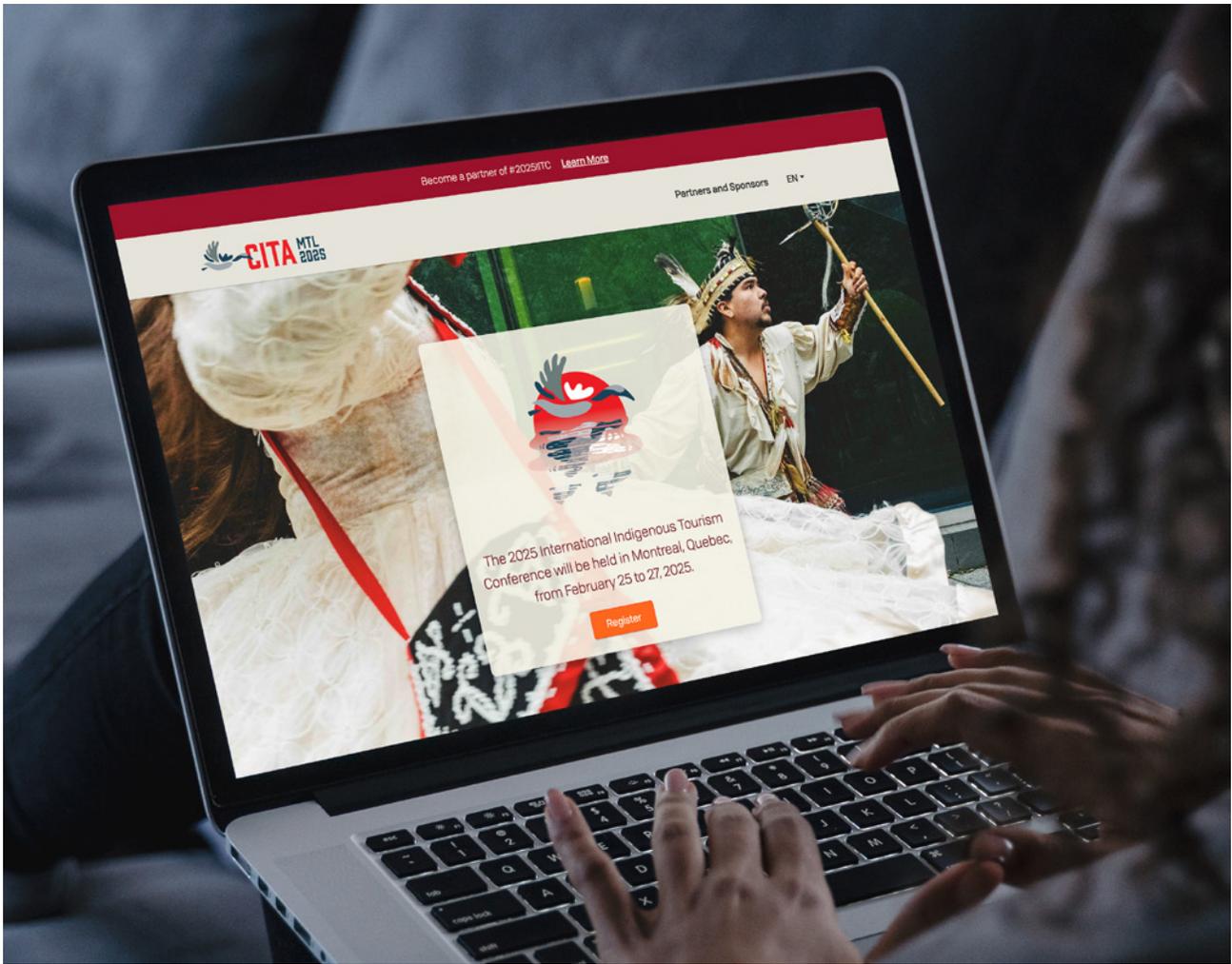
*Throughout 2023, the NRI program provided **business support, marketing tools and training** to 52 Northern Indigenous-owned businesses.*

Business support and resources

Throughout 2023, the NRI program provided business support, marketing tools and training to 52 Northern Indigenous-owned businesses. However, the implementation encountered challenges, particularly in communication. This potentially limited outreach to a broader spectrum of businesses, and some participants remained unaware of this program component.

Marketing

At the Rendez-vous Canada event, ITAC participation included sponsorship, branded Indigenous tourism networking zones, an Indigenous showcase, a welcome ceremony and a travel media presentation. The association also provided a mentorship program, designed for operators who had not previously attended Rendez-vous Canada, to improve event access and facilitate networking. As part of the event, ITAC members and operators participated in 20-minute, pre-booked meetings with tour operators from around the world. To ensure the best matches were made, ITAC assisted



in the meeting selection. These international operators have clients who are interested in an Indigenous tourism experience and are looking for ways to include Indigenous tourism businesses in their itineraries. Thirteen northern businesses participated. Among the northern businesses that attended, there were several other businesses, for a total of 46 booths and operators.

On its social media platforms, at the time of the writing of this report, ITAC has more than 72,000 followers and has generated more than two million views and interactions. During the project timeline, there were 58 posts highlighting Northern businesses. The audience engaging with ITAC's social media content comprises individuals seeking an authentic Indigenous experience who are interested, open-minded and willing to explore new opportunities. Interaction with these social posts not only raises awareness of Indigenous tourism and operators, but it also drives future sales.

FIGURE 1

Curated highlights from the marketing campaign

Indigenous Tourism Canada
March 15, 2023

Experience and intangible sense of community. 🔥

Feel in tune with Indigenous cultures through traditional stories, legends and songs, and share in ancestral knowledge passed down through countless generations. Immerse yourself in the warmth of community at a storytelling event, tap your feet to the beat of the drum at a cultural performance, or watch talented artists craft unique pieces before your very eyes.

📍 Thrive Tours

#DestinationIndigenous | #ExploreCanada | #TheOriginalOriginal



Indigenous Tourism Canada
April 28, 2023

Spring is in the air 🌱

In Indigenous culture, spring is thought of as a time of rebirth and renewal. Not only is this true in nature, but it's also true for the cycle of our lives. As winter comes to an end, we find ourselves wanting to refresh or cleanse ourselves and move into a new chapter.

📍 Aski Holistic Adventures

#DestinationIndigenous | #ExploreCanada | #TheOriginalOriginal



Indigenous Tourism Canada
August 24, 2023

Out of Darkness and Into the Light - What it Means to be Métis:

There was a time when Métis people hid who they were to avoid discrimination. Juanita Marois, the CEO of Métis Crossing grew up knowing she was Métis, but not admitting it – passing herself off as non-Indigenous. When she was taught what it meant to be Métis, she embraced it with open arms and today she manages a 688-acre site that celebrates Métis culture. Built on the original river lots of Métis settlers in the late 1800s, Métis Crossing is home to Alberta's first Métis cultural interpretive destination – conceived, designed, built and operated by Métis People to tell their story. This unique attraction is a fun way to experience a fascinating culture.

#DestinationIndigenous | #ExploreCanada | #TheOriginalOriginal



Indigenous Tourism Canada
August 28, 2023

Nestled along the banks of the serene Tlell River, surrounded by ancient forest and open sky, you'll find the **Haida House at Tilal** – a classic 10-room lodge. With its timeless and cozy log aesthetic, this is the perfect home base from which to start off on your Haida Gwaii adventure. The nightly rate structure is ideal for those who wish to self-explore the many eco-adventures, natural attractions and historical and cultural sites found on Haida Gwaii's Graham and Moresby Islands. Gift shop and conference facilities on-site. Designed to blend harmoniously with the landscape and honour traditional Haida architecture, you'll fall in love with our 12 new two-bedroom cedar cabins. Boasting a choice of dune, ocean, and forest views, each features a minibar kitchen and great room with fireplace, flatscreen TV, covered hot tub and outdoor shower. Enjoy a bed and breakfast cabin stay, or as part of a 3, 4 or 7-night all-inclusive package.

#DestinationIndigenous | #HelloBC | #ExploreCanada | #TheOriginalOriginal | Indigenous Tourism BC | Go Haida Gwaii





Evaluation surveys

The post-programming evaluation survey, conducted from January to March 2024, offered participants the chance to provide feedback and share their experiences throughout all three program phases. Administered online, the survey aimed to gather insights into the program's effectiveness. Despite followup communications and reminders, only 37 participants completed the survey. All program participants were urged to respond to the survey, irrespective of their attendance at the 2023 IITC or eligibility for business supports. However, sections of the survey pertaining to conference attendance and business support utilization saw lower response rates, likely due to some respondents not engaging in these aspects.

A separate post-conference survey was designed to evaluate the IITC experience. This survey, which had 36 respondents, collected detailed feedback on aspects of the conference. In addition to demographic information, key components of this survey included satisfaction with components of the conference, its perceived effectiveness, and engagement and topic preferences.

Program Evaluation Methods

Figure 2 shows the detailed logic model for the NRI program, illustrating its key components and intended outcomes.

To evaluate the effectiveness of programming, two surveys were disseminated:

- > A post-conference survey was shared with participants after the 2023 IITC to solicit feedback on their experiences at the conference.
- > A post-programming survey was shared with participants after NRI program completion to assess their experience with the entire program and collect their feedback on its efficacy.

The post-programming survey aimed to gather comprehensive feedback on the program's impact on Indigenous tourism businesses. Appendix A contains the detailed questionnaire used for this purpose, encompassing all aspects designed to capture the program's key components.

A summary of these key components are as follows:

> **Needs assessment**

Evaluating how well the initial needs assessment identified gaps and progress in participants' businesses

> **In-person learning and networking**

Evaluating the effectiveness of networking opportunities and in-person learning sessions at the IITC, focusing on their contribution to business growth and market readiness

> **Business support**

Assessing the appropriateness and impact of the support resources provided, including financial assistance for business improvements across the key areas: effective community engagement, excellence in visitor experience, ensuring health, safety and comfort, practicing sustainable Indigenous tourism, excellence in marketing and visitor services, and demonstrating business acumen and practices. Additionally, the survey was designed to capture insights on the training and digital marketing tools offered, focusing on the accessibility and relevance of online courses and resources.

> **Program implementation**

Collecting feedback on the overall implementation of the NRI program, including the likelihood of recommending the program to others and suggestions for improvement.

FIGURE 2A

Northern Recovery Incubator program logic model: Activities

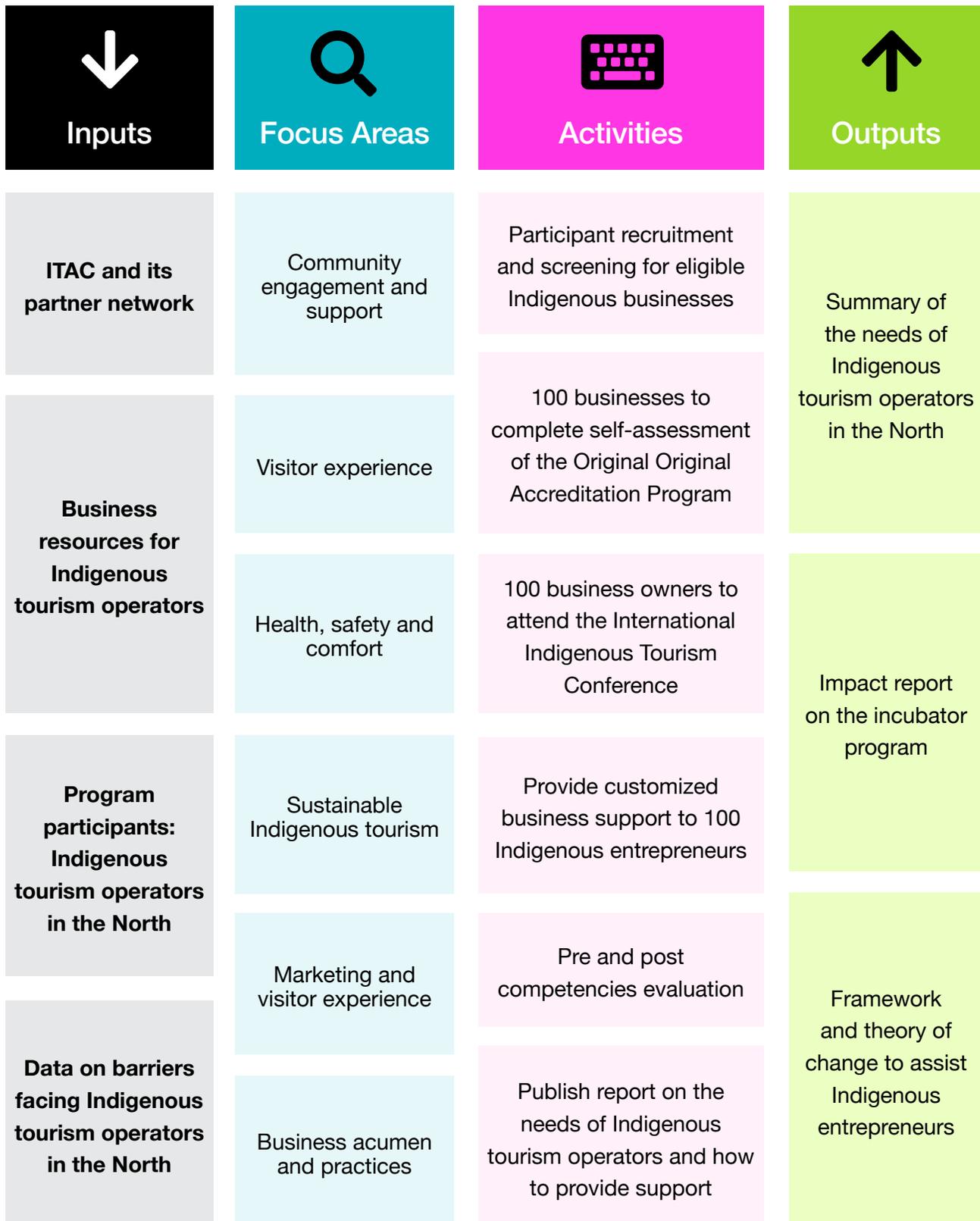
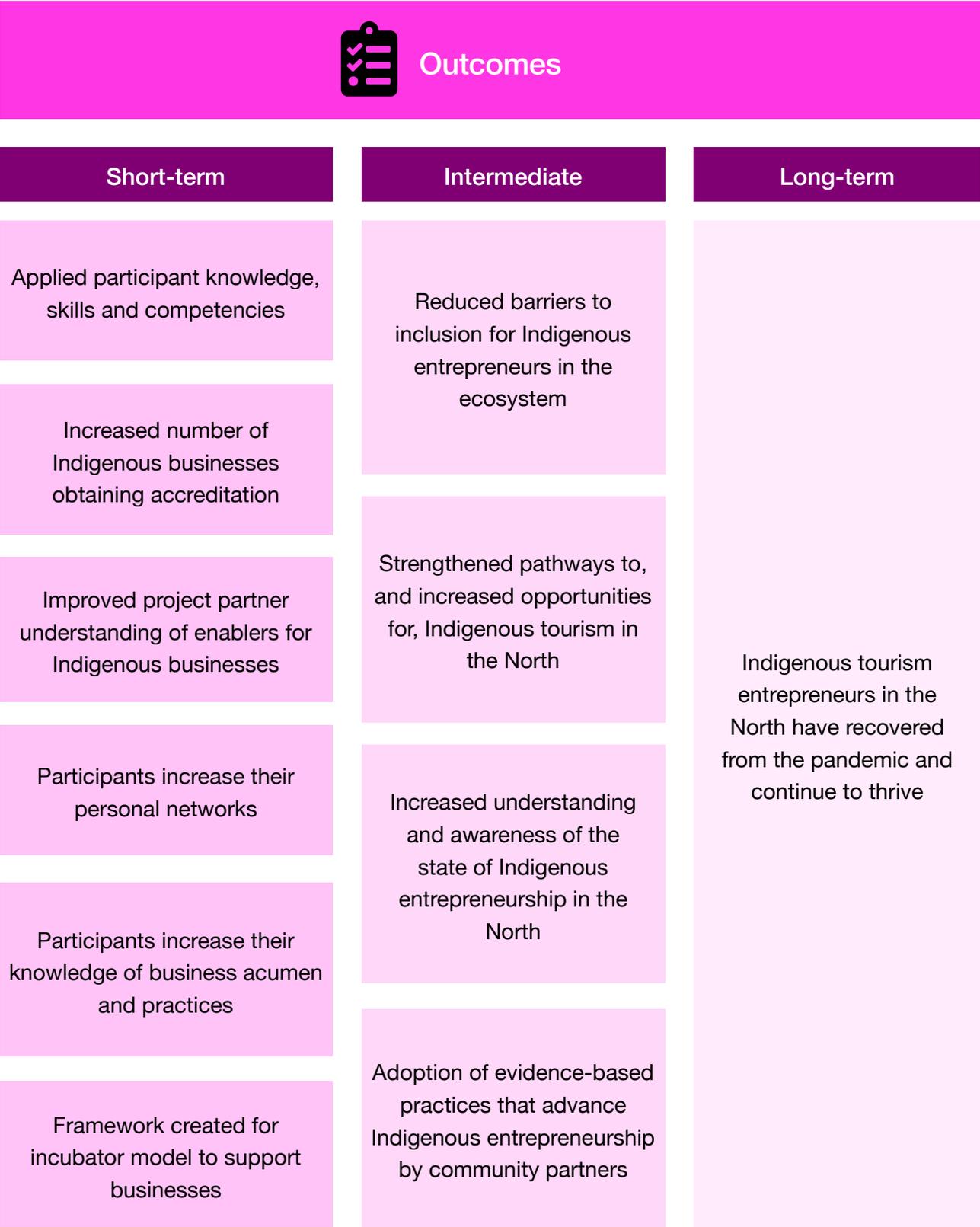


FIGURE 2B

Northern Recovery Incubator program logic model: Outcomes



The post-programming survey incorporated open-ended questions, as well as five- and 10-point Likert scale questions. This aimed to gather a wide range of feedback and measure participants' perceptions and experiences qualitatively and quantitatively. The five-point Likert scale ranged from one ("strongly disagree") to five ("strongly agree"). The 10-point Likert scale provided a broader range for rating overall implementation of the program, from one ("not likely at all") to 10 ("extremely likely"). The mean scores for each question were calculated to determine the average response, providing a clear indication of overall participant sentiment. This approach enabled the identification of trends and patterns in the data, highlighting areas of strength and opportunities for improvement within the program.

There are some limitations to the survey results. Chief among these was the low response rate, as only 37 out of 103 participants completed the survey. Such a limited sample size diminishes the generalizability of the findings given it cannot be known if the responses represent the experiences of all program participants. Furthermore, because survey participation did not hinge on attendance at the IITC or use of business supports, response rates for these sections were even lower. Out of 76 conference attendees, only 16 completed the survey. Out of 52 recipients of business supports, only 15 responded.



Feedback was generally positive, with nearly all survey participants indicating that they would recommend the program to others. Most found the content interesting and easy to understand. The varied delivery methods were also appreciated.

Another constraint is in the reliance on self-reported data, which is inherently subjective and influenced by participants' perceptions. While Likert scale questions could gauge these perceptions, they fall short of providing objective measures of program effectiveness. Responses may be swayed by individual biases, memory recall issues and the social desirability effect, wherein participants respond in a manner they deem favourable. However, administering the survey individually and anonymously mitigated the last effect, as participants likely felt more at ease providing honest feedback.

A further limitation is that while this report presents the initial needs assessment data, results from the followup assessment are not included in the analysis. As such, we are unable to track progress against the criteria evaluated in the needs assessment.

Findings



Participant demographics

Needs assessment

Fifty-five participants answered questions related to demographics and business characteristics in the needs assessment. Among these, 63.6% of businesses are wholly owned and 36.4% are majority owned by Indigenous Peoples. Indigenous women own 54.5% of these businesses, and 10.4% are owned by individuals identifying as two-spirit. First Nations businesses represent a significant portion of the sample, comprising 44% of respondents. Métis businesses account for 18%, Inuit businesses represent 8% of businesses, and 30% of businesses identify with other Indigenous nations.

Geographically, about 20% of businesses are in Newfoundland and Labrador, followed by 16.4% in Ontario and 14.5% in Yukon. The Northwest Territories account for 10.9%, while Alberta and Manitoba each represent 9.1%. British Columbia and Saskatchewan each have 7.3%, with Nunavut at 3.6% and Quebec at 1.8%.

About 11% of businesses operate on reserve lands. A significant majority (63.6%) of businesses own the real estate in which they operate.

Sole proprietorships are the most common business structure, comprising 47.1% of businesses. Corporations follow closely, representing 41.2% of respondents.

Partnerships account for 7.8% of businesses, while not-for-profit organizations make up the remaining 3.9%. Most businesses (56.4%) were established between 2010 and 2019. This is followed by 25.5% founded in 2020 or later. Fewer (10.9%) were founded between 1980 and 1999, and 5.5% were established between 2000 and 2009. Only 1.8% of businesses were established before 1980.

Outdoor adventures, including hiking, fishing and canoeing, are the most common services provided by 30.9% of businesses. Wildlife-viewing workshops and training in cultural knowledge are offered by 23.6% of businesses. Accommodations such as campgrounds, recreational vehicle (RV) parks and cabins account for 12.7% of businesses, as do lodging options in hotels, motels and resorts. Indigenous culinary services, including restaurants, cafes and catering, are provided by 9.1%. Another 10.9% of businesses provide various other services. Additionally, about 36.4% of businesses offer services in Indigenous languages.

TABLE 2**Provinces and territories of International Indigenous Tourism Conference attendees**

Province/Territory	Number of Businesses
Alberta	6
British Columbia	3
Manitoba	4
Newfoundland and Labrador	5
Northwest Territories	2
Nunavut	1
Ontario	4
Quebec	2
Saskatchewan	2
Yukon	7

Post-conference survey

Out of the 76 NRI program respondents who attended the 2023 IITC, 36 completed the post-conference survey. Of those that answered the question about gender identification (n=34), 59% (n=20) identified as women, 32% (n=11) as men, and 9% (n=3) as two-spirit. A breakdown of participation by province is shown in Table 2.

Post-programming survey

Of the 37 people who did the post-programming survey, 34 provided demographic information.

Participants were asked to identify the other equity-deserving groups to which they belong, to understand their multiple intersections and unique experiences. On this question, 38% (n=13) identified as women or non-binary, 21% (n=7) as persons with disabilities, 9% (n=3) as two-spirit and 6% (n=2) as youth under the age of 35, while 44% (n=15) preferred not to disclose. In terms of Indigenous identity, 56% (n=19) identified as First Nations, 26% (n=9) as Métis, 9% (n=3) as Inuit and 9% (n=3) as other.

The duration of business operations among respondents varied, with 38% (n=13) operating for two to five years, 32% (n=11) for more than 10 years, 26% (n=9) for six to 10 years and 3% (n=1) for less than two years. Regarding employment, most participants (56%, n=19) had one to four employees, followed by 26% (n=9) who were self-employed with no employees. Additionally, 12% (n=4) reported 10 to 19 employees, and 6% (n=2) had five to nine employees.

TABLE 3**Annual sales in the last fiscal year**

Amount (CAD)	Number	%
Under \$50,000	7	21
\$50,000 to \$100,000	7	21
\$100,000 to \$250,000	11	32
\$250,000 to \$1,000,000	7	21
\$1,000,000 to \$5,000,000	1	3
Prefer not to answer	1	3

TABLE 4**Annual profit in the last fiscal year**

Amount (CAD)	Number	%
Under \$50,000	19	56
\$50,000 to \$100,000	10	29
\$100,000 to \$250,000	2	6
\$250,000 to \$1,000,000	2	6
Prefer not to answer	1	3

Tables 3 and 4 show the annual sales figures and annual profits disclosed by respondents for the most recent year. Nearly one-third of respondents (32%, n=11) had sales between \$100,000 and \$250,000. This was followed by 21% (n=7) in each of the following ranges: under \$50,000, between \$50,000 and \$100,000, and between \$250,000 and \$1,000,000. A single participant reported sales of \$1 million to \$5 million, while another declined to answer. When it came to net revenue, the majority (56%, n=19) reported their annual profits to be under \$50,000, followed by 29% (n=10) with profits between \$50,000 and \$100,000. Four respondents (12%) reported profits of more than \$100,000, while one declined to answer.

**Respondents' reported sales**

32%
between
\$100,000 and
\$250,000

21%
under
\$50,000

21%
between
\$50,000 and
\$100,000

21%
between
\$250,000 and
\$1,000,000

TABLE 5**Needs assessment results for business readiness categories**

Category	Meets Criteria (%)	Does Not Meet Criteria (%)	Unsure (%)
Meaningful engagement of Indigenous Peoples from tourism region	92.1	2.8	5.1
Respects rights of Indigenous Peoples	90.6	4	5.4
Promotes diversity of Indigenous populations and cultures	88.4	6.7	4.9
Socio-economic benefits for Indigenous Peoples of the tourism region	100	0	0
Maintains quality assurance of visitor service standards	85.3	5.1	9.7
Ensures accessibility	71.9	15.2	12.9
Complies with required health, safety and security regulations	96.9	0.2	2.9
Emergency response plan	80.9	6.7	12.4
System for mitigating environmental impacts	80.9	3.4	15.7
Business sustainability plan	75.7	9	15.2
Information	84.5	7.9	7.6
Market intelligence	85.1	6.9	8
Market strategy	68.5	22.5	9
Product and services, production/development	86.5	3.4	10.1
Essential business requirements	85.6	6.2	8.2
Financing and financial management	94.4	2.8	2.8
Management of operations	97.8	1.1	1.1
Maintains appropriate people resources, staff matters	82	6.7	11.2

Needs assessment results

A total of 103 businesses completed the initial needs assessment, with some businesses completing more than one component. Below are the aggregate results for business readiness (89 businesses), visitor readiness (30) and export readiness (30).

Business readiness

A total of 89 businesses completed the business readiness needs assessment. This assessment covered 18 categories and evaluated 45 criteria, with some categories including multiple criteria. Table 5 shows the 18 categories, as well as the average percentages of businesses that met, did not meet or were unsure about the criteria within each of them.



Photo via Indigenous Tourism Association of Canada

A look at the 45 criteria within the broader categories provides a clearer view of businesses' readiness. The results for meaningful engagement of Indigenous Peoples from the tourism region show that almost all— 94.4% —of businesses ensure that cultural content is developed in collaboration with and sanctioned by Indigenous Peoples. Moreover, 97.8% of businesses create opportunities for community members. When it comes to providing means for community members to give input on matters that affect them, 80.9% of businesses do so. Additionally, 95.5% of businesses extend the benefits of tourism to the community.

Businesses also show a commitment to respecting the rights of Indigenous Peoples through various practices. For example, 95.5% of businesses obtain advice from the appropriate Indigenous community on Indigenous protocols. Similarly, 95.5% of businesses ensure that their products or services recognize and promote the rights of Indigenous Peoples; and 94.3% of businesses follow the protocol for territory or land acknowledgment. However, a lower percentage (77.3%) of businesses have obtained formal rights to the use of the lands and resources.

In promoting the diversity of Indigenous populations and cultures, nearly all—98.9%— businesses respect cultural protocols. Additionally, 95.5% of businesses inform and educate visitors on the accepted behaviour while on-site or in the community, ensuring that guests are aware of and respect local

norms. The inclusion and diversity within the workforce are also prioritized, with 94.3% of businesses having hiring policies and procedures that promote these values. Furthermore, 96.6% of businesses provide opportunities for visitors to interact in person with Indigenous Peoples. About 82% of businesses expose visitors to local Indigenous languages, and 62.9% of businesses have interpretive workers wear contemporary or traditional Indigenous apparel. All businesses prioritize the socio-economic benefits for the Indigenous Peoples of the tourism region and offer tourism products or services that have a positive impact on the Indigenous community.

For maintaining quality assurance for visitor services, 87.4% of businesses have test-marketed their products or services, ensuring they meet the needs and expectations of their target audiences. Additionally, 83.1% of businesses provide special equipment or training to enhance the visitor experience and ensure safety and satisfaction. Businesses are making strides toward ensuring accessibility, with 79.8% providing accurate and current information on the availability of accessible facilities. However, only 64% can accommodate persons with disabilities.

The results show that businesses are highly compliant with health, safety and security regulations. All businesses ensure their equipment and vehicles are in a good state of repair, 98.9% comply with health and safety regulations, 96.6% have required safety equipment in good working order, 97.8% follow security regulations and protocols,

and 91% have access to health and medical services. A substantial majority (80.9%) of businesses have emergency response plans.

Businesses are actively engaged in mitigating environmental impacts, with 80.9% of them conserving energy. Regarding business sustainability plans, 81.8% of businesses have the resources necessary to be self-sustainable, and 69.7% of businesses have an emergency risk management plan to respond to major disruptions.

The results indicate that businesses place a high priority on providing comprehensive and accessible information to their audience, with 94.4% maintaining an online presence. Additionally, 92% offer information that is current, accurate and informative. Furthermore, 79.5% use in-print marketing materials, and 71.9% host familiarization tours.

Businesses are well-equipped with market intelligence, with 85.1% having research or information to understand current and potential markets. Furthermore, 68.5% have a detailed marketing plan, reflecting commitments to market strategy. The results indicate that businesses are effectively aligning their product and service production and development with market demands and strategic marketing practices. In addition, 92.1% ensure their products and services are priced appropriately, 86.5% align their offerings with market demand, and 80.9% use digital and conventional marketing strategies that are aligned with their marketing plan.

TABLE 6**Needs assessment results for visitor readiness**

Category	Meets Criteria (%)	Does Not Meet Criteria (%)	Unsure (%)
Effective community relationships	92.8	2.6	4.6
Promotes diversity of Indigenous populations and cultures	89.5	6.6	3.9
Socio-economic benefits for Indigenous Peoples of the tourism region	92.1	0	7.9
Maintains quality assurance of visitor service standards	98.7	0	1.3
Emergency response plan	81.6	7.9	10.5
System for mitigating environmental impacts	92.3	0	7.7
Information	94.7	0	5.3
Market strategy	74.4	15.4	10.3
Product and services, production/development	91.5	5.1	3.4
Visitor services	76.3	17.1	6.6
Essential business requirements	94.9	2.6	2.6
Financing and financial management	88.5	9	2.6
Management of operations	83.8	11.1	5.1
Maintains appropriate people resources, staff matters	81.6	11.8	6.6

The needs assessment shows that Indigenous tourism operators are largely compliant with essential business requirements, ensuring a solid foundation for their operations. Almost all (95.5%) have the necessary licences, permits and regulatory requirements in place. Additionally, 87.5% have insurance to protect against legal liability, 82% have a business plan with an operating budget, and 77.5% have essential infrastructure for their operations. They also exhibit strong financial management, with 95.5% having the capacity to manage cash and commerce functions, and 93.3% having the means to cover operating costs. Moreover, 97.8% of businesses ensure their facilities, vehicles and equipment are in good repair, reflecting a commitment

to operational management. Businesses maintain appropriate people resources and staff matters, with 82% having enough staff to address visitor demand.

Visitor readiness

A total of 39 Indigenous businesses completed the visitor readiness assessment, which had 14 categories and evaluated 28 criteria. Table 6 shows the categories and presents the percentages of businesses that met, did not meet or were unsure about the criteria within each.

The results indicate that businesses have effective community relationships. All businesses stated they have the support of the local Indigenous community for their tourism

initiatives. Additionally, 74.4% of businesses foster positive working relationships with competitors, 92.1% of business leaders are active members of tourism industry organizations, and 81.6% have secured local partnerships with destination marketing organizations or industry associations.

In promoting the diversity of Indigenous populations and cultures, 97.4% educate visitors on traditional Indigenous knowledge or practices. Moreover, 78.9% offer traditional or new Indigenous culinary experiences, 84.2% provide authentic Indigenous artisan crafts or goods, and 97.4% incorporate Indigenous decor and design into the visitor experience. A significant majority, 92.1%, provide socio-economic benefits to the Indigenous Peoples in their regions through opportunities for cultural preservation.

Businesses maintain quality assurance for visitor services, with all businesses responding to visitor inquiries within the same day and 97.4% actively monitoring and responding to visitor experiences as needed. Many businesses meet the criterion for providing information, with 94.7% offering easy-to-access detailed pricing and product information.

Emergency response plans are in place for most businesses. Notably, 81.6% have employees responsible for visitor safety who have received up-to-date health and safety training. Furthermore, 92.3% have systems for mitigating environmental impacts.



*In promoting the diversity of Indigenous populations and cultures, **97% of businesses educate visitors on traditional Indigenous knowledge or practices.***

Regarding market strategy, 74.4% conduct sales forecasting. In terms of products and services, 87.2% of businesses reported having the capacity to participate in conferences or expo events, 94.9% indicated their capability to develop products or services, and 92.3% confirmed they could distribute or deliver products, merchandise or services. Visitor services results show that 83.3% of businesses have the required online e-commerce capacity, while 69.2% have an online booking platform or are members of a third-party booking platform.

The vast majority (94.9%) meet the criterion of having standard operating procedures for essential business requirements. In financial management, 92.3% operate with an established accounting system, and 84.6% have the means to market their products and services. For management of operations, 89.7% of businesses have operational policies and procedures in place. Additionally, 84.6% have essential human resources practices and 76.9% have established management

FIGURE 3

Percentage of businesses that met export readiness criteria



or governance structures. In maintaining appropriate people resources and staff matters, 71.1% of businesses have qualified heritage interpreters, and 92.1% provide or invest in appropriate training for various roles and business needs.

Export readiness

A total of 30 businesses completed the export readiness assessment, which evaluated eight criteria. Figure 3 shows the percentages of businesses that met each of these criteria.

The results indicate that businesses are highly committed to advocating for local Indigenous Peoples and tourism businesses in the region, with 96.7% meeting this criterion. Additionally, 86.7% of businesses seek formal partnerships with community-based

organizations or other agencies, showcasing their dedication to fostering collaborative relationships. Public relations activities are conducted by 80% of businesses. More than two-thirds (69%) of businesses maintain an inventory management or procurement system, ensuring efficient operations and resource management. A formal working relationship with receptive tour operators has been established by 63.3% of businesses. Additionally, 60% of businesses are accredited by a third party on the quality of their products or services. Less than one-half (46.7%) of the businesses have established travel-trade partnerships. Similarly, only 44.8% offer special packages for visitors with disabilities.

TABLE 7**Mean satisfaction scores for conference**

Question	Score
Considering the conference as a whole, how satisfied were you with the experience?	3.78
How satisfied were you with the event organization of the conference?	3.86
How satisfied were you with the cultural tours offered on March 8, 2023?	3.80
How satisfied were you with the presenters and/or presentation content offered at the conference?	3.86
How satisfied were you with the marketplace offered at the conference?	3.00
How likely are you to attend future ITAC conferences?	3.92

Post-conference survey results

After the 2023 IITC, 36 respondents completed the post-conference survey. Most (56%) of respondents heard about the conference through email (28%) or had attended it in the past (28%). The most important reason cited for attending was networking and connecting with other participants (58%), followed by professional development (14%).

Participants rated their satisfaction with components of the conference on a scale from a low of one to a high of five. The mean scores are shown in Table 7. The highest-rated aspect of the conference was the likelihood of attendees participating in future events.



IITC 2023, Photo via Indigenous Tourism Association of Canada

TABLE 8**Mean scores for conference effectiveness and engagement**

Statement	Score
The conference helped me make connections with others interested in Indigenous tourism	3.81
The conference provided me with a better understanding of issues impacting Indigenous tourism	3.81
The conference supported my professional development	3.72
The conference agenda overall kept me interested and engaged	3.78

Participants were also asked to rate, from one to five, how strongly they agreed with statements regarding the conference’s effectiveness in fostering connections, enhancing understanding of key issues, supporting professional development and maintaining engagement (Table 8). Two statements tied for the highest score, at 3.81. These concerned the conference’s role in facilitating connections with others interested in Indigenous tourism and enhancing participants’ understanding of issues affecting Indigenous tourism. The lowest score, at 3.72, was for the conference’s contribution to professional growth.

The conference agenda, guided by the four pillars of the ITAC three-year strategic plan—leadership, development, marketing and partnership—aimed to address the diverse interests and needs of its participants. When asked to identify the most valuable topic, participants showed varied preferences. Of 35 respondents, 31% found the development pillar to be the most valuable. The partnership pillar followed closely, with 29% of participants highlighting its importance. The leadership pillar was selected by 23% of participants, while the marketing pillar was deemed most valuable by 17% of participants.

Post-programming survey results

Overall programming feedback

Participants were asked how likely they would recommend ITAC to a friend or colleague, with one being “not at all likely” and 10 being “extremely likely.” The responses yielded an average score of 8.86, with a significant majority (76%) rating it a 10. Overall, respondents viewed ITAC as a vital organization for Indigenous business support and development.

Many expressed gratitude for the essential support ITAC has provided, crediting it with their current success. As one respondent noted, “Without ITAC we wouldn’t be where we are at today. Very grateful for all that you do.” The association was also commended for its inclusiveness and global reach. “It’s a great organization and is far-reaching,” a respondent said. “It doesn’t limit us to one region; it is inclusive of every Indigenous group ... now globally. It’s something that should be looked at by all Indigenous organizations. ITAC is setting a high standard.”



Photo via Indigenous Tourism Association of Canada

The organization’s role during the pandemic was appreciated, with some businesses stating they might not have survived without ITAC’s grants and assistance. The financial support received from ITAC has been crucial for business growth and enhancing market readiness. “We really appreciate all the financial help that we receive because we need it to grow and make our business more market ready and to provide an excellent and authentic visitor experience,” a respondent said.

The support, networking opportunities and professional services offered by ITAC were highly valued. As one respondent shared, “Our experience has been nothing but positive and has been extremely important to our growth. Everyone we deal with has been highly professional and easy to communicate with. It’s been an excellent experience.”

Additional feedback from respondents included suggestions for involving Indigenous media and content creators in future events to enhance engagement. Improved communication was also suggested, as some participants occasionally missed out on opportunities.

TABLE 9**Effectiveness of needs assessment in capturing gaps and progress**

Question	Mean Score
The self-assessment questionnaire provided me with a good understanding of the gaps in my business	3.59
How well did the self-assessment questionnaire capture your progress on each of the following areas of business:	
Community engagement and support	4.52
Visitor experience	4.6
Health, safety and comfort	4.48
Sustainable Indigenous tourism	4.48
Marketing and visitor services	4.56
Business acumen and practices	4.46
Other needs	4.22

Programming results

Needs assessment

The post-programming survey included questions aimed at understanding how effectively the needs assessment captured the gaps and progress of Indigenous tourism businesses. Participants rated their responses on a five-point scale, with one being “strongly disagree” and five being “strongly agree.” A total of 28 participants completed this section of the survey. The survey responses suggest that the needs assessment was more successful in capturing progress than identifying gaps. Results are shown in Table 9.

The statement about the questionnaire providing “a good understanding of the gaps in my business” received an average score of 3.59, indicating a need for improvement.

In contrast, when asked about how well the needs assessment captured their progress, all six categories received high average scores. The highest rating was for visitor experience, with a mean score of 4.6. This was closely followed by marketing and visitor services (4.56) and community engagement and support (4.52). Health, safety and comfort, along with sustainable Indigenous tourism, each received a score of 4.48. Business acumen/practices had a mean score of 4.46. Other needs received the lowest score of 4.22, indicating that some areas were less effectively captured by the questionnaire.

Some respondents noted that certain activities within the tourism sector, such as those pertaining to souvenirs, were not adequately captured. Additionally, many questions were geared toward outfitters and guides, lacking relevance for other types of businesses. On this point, respondents highlighted the need for a more balanced recognition of different types of tourism, such as cultural tourism,



IITC 2023, Photo via Indigenous Tourism Association of Canada

rather than focusing on adventure tourism. They also noted the importance of recognizing businesses operating in remote communities. The questionnaire also did not address travel expenses or limited infrastructure, which can hinder offerings such as overnight excursions. Nor did the assessment capture employee needs.

Various challenges in completing the self-assessment were mentioned by respondents, including the need for guidance from program staff, slow Internet connections and frequent logging out issues. The length and repetitiveness of the assessment were also cited as challenges, particularly for those with disabilities or who are neurodiverse, making it time-consuming and difficult to complete.

International Indigenous Tourism Conference

A total of 24 respondents completed the post-programming survey questions related to the 2023 IITC. Of these, 67% attended the conference, while 33% did not. The primary reasons for not attending were financial constraints and various work commitments.

On average, attendees connected with 34 people, with the number of connections ranging from 10 to 100. The quality of these connections was rated highly, with an average score of 4.5, where one indicates “very poor” and five indicates “very good.”

The responses highlighted several valuable aspects of the conference. Attendees appreciated the opportunity to visit local businesses and experience their storytelling. The diversity of services at the conference inspired some to expand their tourism offerings. The overall conference setup, professionalism and networking during breaks were highly regarded, as were the variety and quality of breakout sessions. Other highlights included participating in presentations, learning about funding and marketing strategies from new business owners, and feeling inspired by businesses’ achievements.

The focus on international tourism initiatives was also noted as impactful. “Seeing Indigenous tourism on the international stage was inspiring and gave us hope,” one respondent said, and “Coming from a small

city and feeling very alone in what we are doing sometimes, it was great to connect with other businesses and see that what we are doing is something to be proud of.”

This sentiment was echoed by many respondents. They appreciated the connections made with local providers for potential collaboration as well as other small operators, which helped them feel less isolated. One attendee noted: “As a small operator, we feel we are alone, and this event showed us not only are we not alone but there are many successful and fascinating operators out there. From a local standpoint, I was able to connect with other local providers and discuss collaboration and build friendships vs. acquaintances.”

Although the conference was rated positively overall, attendees noted some challenges. Financial constraints, long travel times and logistical issues, such as hotel bookings and delayed travel reimbursements, were common. Respondents offered suggestions for improving the subsidy support process, emphasizing clearer communication and delivery on expectations, and extending timelines for support. One recommendation was to use direct deposit for subsidies instead of mailing cheques to streamline the process. Additionally, more advanced communication regarding arrangements, such as hotel bookings and event details, was highlighted. The speaker series was useful for addressing shared challenges, and it was suggested that greater engagement with Indigenous leaders rather than government partners would have a more significant impact.

Business support

Of the 52 Indigenous businesses that received business support, 15 respondents reported receiving it in the survey. Reasons for not receiving business support included pending reviews, lack of awareness about the program and needing more guidance in completing the application.



Reasons for not receiving business support included:

- > pending reviews
- > lack of awareness about the program
- > needing more guidance in completing the application

TABLE 10
Effectiveness of business support received

Statement	Mean Score
I received support that was tailored to my business needs	4.6
The amount of support I received from the program was appropriate	4.4
The support I received has helped my business meet Canada’s market readiness standards	4.5

The survey results indicated that the business supports were generally effective, as shown in Table 10. Respondents who received funding reported positive outcomes, with the statement about support being “tailored to my business needs” receiving an average score of 4.6. The ability to meet Canada’s market readiness standards was rated at 4.5, and the appropriateness of the support was also rated highly

While many respondents felt their challenges were adequately addressed, some noted areas for improvement. These included the need for additional funding and capital for essential equipment, and the high cost of general merchandise. Financial literacy education, including learning how to forecast and understand business needs, was also cited. One respondent emphasized the idea of regionalizing the process to account for differences in business costs and demand.

Additionally, there were calls for more individualized support to address specific business needs and to tackle challenges such as remaining operational and finding staff during periods experiencing significant market disruptions like those during the COVID-19 pandemic. Suggestions included one-on-one coaching and online interactive workshops to enhance business knowledge.

Respondents proposed assigning dedicated individuals to support each business, which would simplify the process and cater to the business’ needs. This approach could also help to mitigate the hesitation some business owners might feel in asking for assistance, making it a more integral part of the support system and eliminating the pride-related barriers that may hinder goal achievement.

A significant emphasis was placed on supporting businesses with marketing tools, focusing on visitor and revenue recovery due to their critical importance for tourism businesses. Participation in this area varied among respondents. Reasons for not participating included time constraints (such as training being offered during peak business seasons), digital gaps being already addressed through previous ITAC grants, and a lack of awareness or understanding of the marketing training available. For those who did participate, valuable aspects included one-on-one sessions, assistance with concrete tools like Google Analytics and flexible timelines for engagement.

Learnings & Next Steps



The evaluation of the NRI program revealed several positive results and areas for improvement. The program successfully engaged a diverse range of Indigenous tourism businesses, with a high level of participation in the initial needs assessment phase. Participants appreciated the support provided, particularly in terms of business development, market readiness and networking opportunities. The IITC was highly valued for its networking opportunities, diverse sessions and the chance to learn from other Indigenous tourism operators. Business support provided through the program was generally effective, with participants rating the tailored support highly.

Some respondents, however, indicated the need for additional funding and resources, particularly for essential equipment and financial literacy education. The marketing support initiatives were well-received by those who participated and crucial for helping businesses enhance their online presence and marketing strategies, but some participants were unaware of these opportunities, which highlights the need for improved communication.

Recommendations were identified to enhance the NRI program's effectiveness and ensure it continues to provide valuable support to Indigenous tourism businesses. The key themes include improving communication and outreach, tailoring support to diverse business needs, refining the needs assessment process, streamlining financial support procedures and addressing broader business challenges. Through work in these areas, the program can better serve its participants and contribute to the sustainable growth of the Indigenous tourism sector.



Recommendations

> **Enhance communication and outreach**

Although participation in the initial needs assessment phase was successful, better communication is needed to improve awareness and participation in subsequent stages of the program. To ensure all eligible businesses are aware of available resources, information should be disseminated more proactively and transparently. Simplifying messaging to make it easily understandable and accessible would help engage a broader audience, particularly within Indigenous communities. Personalized outreach efforts, such as direct contact with individual businesses, are effective in enhancing engagement and responsiveness.

> **Tailor support to diverse business needs**

Support should recognize the diversity within Indigenous tourism businesses. Providing personalized assistance, such as assigning dedicated consultants or guides for immediate help when business owners need it, and creating individualized development plans, would ensure that the support offered is relevant and impactful for each business.

> **Improve the needs assessment process**

The self-assessment questionnaire should be revised to capture the diverse range of business activities and needs of participants better. Incorporating feedback from previous participants would make the assessment more inclusive of various types of tourism businesses, including cultural and non-adventure tourism. Simplifying the language, reducing redundancy and

ensuring accessibility for participants with disabilities or neurodiverse conditions would make the assessment more user-friendly. Additionally, offering alternate methods to complete the self-assessment, such as paper-and-pencil versions that can be mailed, would accommodate those in regions with poor Internet connectivity. Furthermore, developing a self-assessment tailored for small tourism operators in the North will ensure that the requirements to obtain The Original Originals Accreditation are relevant and feasible for these businesses.

> **Streamline financial support processes**

Enhancing the administration of financial support would avoid delays and improve the overall experience for participants. Implementing direct deposit options for subsidies and providing clearer and more advanced communication about the support process would streamline operations. Simplifying the application and reimbursement processes would help alleviate financial and logistical challenges. Additionally, increased funding for travel to the IITC should be considered, given the substantially higher costs of travel from the North.

> **Address broader business challenges**

Consider offering additional support in areas such as financial literacy, business forecasting and employee management. Providing education and resources in these areas can help businesses build resilience and adapt to market changes more effectively.

Appendix

ITAC Northern Recovery Incubator: Post-Programming Survey

Section 1: Preamble

This survey is to gather feedback regarding the Indigenous Tourism Association of Canada's (ITAC) Northern Recovery Incubator Project, which was delivered in three phases:

- > Self-assessment
- > Business supports
- > Attendance at the International Indigenous Tourism Conference in March 2023.

ITAC wants to hear from you! Tell us about your experience navigating The Original Original Accreditation Program Self-Assessment, your interactions with ITAC staff, the success of your participation in the Business Support Program, your participation in the International Indigenous Tourism Conference in Winnipeg, MB, and any wins or challenges you may have had throughout the process. This will be a phase-by-phase survey, taking you through each phase that your business would have gone through throughout this project.

To track the completion of the survey of the participants in the program, please tell us your name and email address. **Your personal information will not be tied to your data:**

- > Name:
- > Email address:

Please answer all the questions that pertain to your journey.

Section 2: Demographic Questions

We are interested in looking at the intersections of multiple equity-deserving groups to understand their unique experiences. For this reason, we would like to know if you belong to other equity-deserving groups.

Do you self-identify with any of the following categories? (select all that apply):

- > Women-identifying/Non-binary
- > Two-spirit
- > LGBTQ+
- > Person with disability
- > Youth (under the age of 35)
- > Yes, but prefer not to specify
- > Prefer not to answer

Are you?

- > First Nations (Status or non-Status, or Native American)
- > Métis
- > Inuk (Inuit)
- > Prefer to specify: _____
- > Prefer not to answer

How long has your business been in operation?

- > Less than 2 years
- > 2 to 5 years
- > 6 to 10 years
- > More than 10 years
- > Prefer not to answer

How many full-time employees worked for your business in the last fiscal year?

Please include part-time staff as the number of full-time equivalents (e.g., two half-time employees equals one full-time employee).

- > I am self-employed, and there are no employees
- > 1 to 4
- > 5 to 9

- > 10 to 19
- > 20 to 49
- > 50 to 99
- > 100 to 199
- > 200 to 499
- > More than 500
- > Prefer not to answer

Please indicate your business's most recent annual sales in the last fiscal year.

- > Under \$50,000
- > \$50,000 to \$100,000
- > \$100,000 to \$250,000
- > \$250,000 to \$1,000,000
- > \$1,000,000 to \$5,000,000
- > \$5,000,000 to \$20,000,000
- > Over \$20,000,000
- > Prefer not to answer

Please indicate your business's most recent annual net revenue (profit) in the last fiscal year.

- > Under \$50,000
- > \$50,000 to \$100,000
- > \$100,000 to \$250,000
- > \$250,000 to \$1,000,000
- > \$1,000,000 to \$5,000,000
- > \$5,000,000 to \$20,000,000
- > Over \$20,000,000
- > Prefer not to answer

Section 3: The Original Original Accreditation Program Self-Assessment

The Original Accreditation Program is ITAC’s mark of excellence that assures visitors of a quality experience. Accredited businesses offer products and services that are truly authentic and showcase the Indigenous brand of quality. Businesses accredited to use The Original mark of excellence are given priority treatment in ITAC’s marketing programs and have access to exclusive development and marketing opportunities. The first step towards being fully accredited was to take a self evaluation. Once completed, you would have received a summary of your answers letting you see where you are excelling and identifying where you might have some gaps in your business standards to work towards before receiving full accreditation.

Please answer the questions in this section specifically regarding your experience taking The Original Original Accreditation Program Self-Assessment.

Please rate your agreement with the following statement: The self-assessment questionnaire provided me with a good understanding of the gaps in my business.

Strongly Disagree	Disagree	Neutral	Strongly Agree	Prefer not to Answer
1	2	3	5	N/A

How well did the self-assessment questionnaire capture your progress on each of the following areas of business?

1- very poor, 2 - poor, 3 - fair, 4 - good, 5 - excellent, 6 - prefer not to answer

- > Community engagement and support
- > Visitor experience
- > Health, safety and comfort
- > Sustainable Indigenous tourism
- > Marketing and visitor services
- > Business acumen/practices
- > Other needs (Please specify_____)

What were some of the needs your business has that were not captured in the self-assessment questionnaire?

[Long Text]

Please describe any challenges you experienced in completing the self-assessment.

[Long text]

Do you have any recommendations about the self-assessment process based on your experience? (e.g., delivery of the self-assessment, the content of the self-assessment)

[Long text]

Section 4: Business Support Program

ITAC's Business Support Program (BSP) is a complement to ITAC's Accreditation Program. This program considers that market readiness evolves differently for each Indigenous tourism business depending on factors such as the availability of resources, cash flow and market conditions.

The goal of ITAC's Business Support Program is to help Indigenous tourism operators in Canada meet market readiness standards. The program worked towards this goal by asking businesses to identify projects that will help them address gaps identified through the accreditation process.

Please answer the questions in this section specifically regarding your experience with receiving business support throughout your involvement in ITAC's Northern Tourism Recovery Incubator program.

Did you receive business support through ITAC's Business Support Program?

- > Yes
- > No
- > Prefer not to answer

[If answer is Yes]

To what extent do you agree with the following statements about the business support program?

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Disagree	Prefer Not To Answer
I received support that was tailored to my business needs						
The amount of support I received from the program was appropriate						
The support I received has helped my business meet Canada's market readiness standards						

[If answer is No]

Why did you not receive business support through the Business Support Program?

[Long Text]

Were there unique challenges to your business that weren't addressed by the Business Support Program?

[Long text]

What challenges did you face during the process overall?

[Long text]

Do you have any suggestions regarding the Business Support Program process?

[Long text]

Section 5: Support to attend the International Indigenous Tourism Conference

As part of this project ITAC had the ability to support up to 100 Northern businesses to attend the International Indigenous Tourism Conference (2023IITC) in Winnipeg, MB from March 8–10, 2023. ITAC's conference brings together tourism professionals from around the world in the spirit of learning and inspiration. As the largest Indigenous tourism conference in the world, IITC contributes greatly toward the advancement of the Indigenous tourism industry with discussions focused on ITAC's four pillars: Partnership, Leadership, Marketing and Development, as well as industry leaders from across the world discussing opportunities, challenges and successes.

Please answer the questions in this section specifically regarding your experience with receiving support to attend the International Indigenous Tourism Conference (2023IITC) in Winnipeg in March 2023.

Did you attend the International Indigenous Tourism Conference (2023IITC) from March 8–10, 2023 in Winnipeg, Manitoba?

> Yes

> No

> Prefer not to answer

[If answer is No]

Why did you not attend the 2023 IITC conference in Winnipeg, Manitoba?

[Long text]

[If answer is Yes]

Approximately, how many people did you connect with during the IITC conference?

[Short text]

[If answer is Yes]

How would you rate the quality of the connections you made at the IITC conference?

1- very poor, 2 - poor, 3 - acceptable, 4 - good, 5 - very good

[If answer is Yes]

Please describe 1 or 2 specific aspects about the conference that you found the most valuable to strengthening your business:

[Long text]

[If answer is Yes]

What were the unique challenges that you experienced during the process of attending 2023IITC?

[Long text]

[If answer is Yes]

Do you have any suggestions for ITAC regarding the subsidy support process? (For example: criteria, delivery of subsidy, administration, logistics, etc.) [Long text]

Section 6: Support for Marketing Initiatives

As part of this project, ITAC has supported up to 100 Northern businesses through marketing initiatives, including mentorship, digital incubation, itinerary development and calls to action.

Please answer the questions in this section specifically regarding your experience with ITAC marketing support initiatives in 2023.

Did your business participate in the Jelly Marketing Digital Incubator?

- > Yes
- > No
- > Prefer not to answer

[If answer is No]

Why did you not participate in the digital incubator?

[Long text]

Did your business participate in the full mentorship program (online classes through the cohort), or did you choose the self-guided model through the E-Learning Platform?

- > Digital Incubation Mentorship
- > E-Learning Platform
- > Both
- > I did not participate
- > Prefer not to answer

[If options 1–3 above]

Please describe 1 or 2 specific aspects about the digital incubator program you found most valuable:

[Long text]

[[If options 1–3 above]

What were the unique challenges that you experienced in identifying your marketing needs?

[Long text]

Did your business participate in the JonView tariff (itinerary) as you met export-ready standards for working with the travel trade?

- > Yes, we participated.
- > No, we did not participate, though we met the export-ready standards.
- > No, we did not participate since we did not meet the export-ready standards.
- > Prefer not to answer

Did your business participate in the northern “Out of Home” Campaign?

- > Yes
- > No
- > Prefer not to answer

Do you have any suggestions for ITAC regarding the marketing support process? (For example: criteria, delivery of subsidy, administration, logistics, etc.)

[Long text]

Section 7: Final Thoughts

How likely is it that you would recommend ITAC to a friend or colleague?

(1–10, not at all likely to extremely likely, with prefer not to answer as an option)

Please explain why you gave it this rating:

[Long text]

Do you have any other comments or feedback that you would like to share with us about your experience with ITAC’s Northern Tourism Recovery Incubator?

[Long text]

References

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