

Indigenous Tourism Alberta (ITA)

Alberta Indigenous Tourism Demand Report

2019



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Executive Summary

The United Nations World Trade Organization states:

“Tourists that visit indigenous communities ... numbers are steadily increasing given the growth of tourism motivated by the interest to experience indigenous cultures and traditional lifestyles.”

The traveller is changing in terms of what they want to achieve and how they will achieve it. As shown below in the infographic from Destination Canada, the traveller is seeking a transformative experience which authentic Indigenous tourism can very effectively and honestly deliver.

The traveller's journey



Project Overview

This research report is produced by Indigenous Tourism Alberta (ITA) to better understand the marketplace demand for Indigenous tourism in Alberta. With this research, ITA can more effectively target its programs and projects to reflect the demand based on numerous factors including socio-economic and geographic target groups, the travellers' path to purchase and opportunities to develop effective partnerships with the travel trade in order strategically attract tourism demand to authentic Indigenous tourism businesses in Alberta.

Objectives

ITA's priority objectives or goals of this research are to:

- 1) More fully understand the tourism demand for Indigenous tourism in Canada and, more specifically, in Alberta
- 2) Gain a broader, more up-to-date understanding of the tourism demand to allow ITA to develop more effective and relevant programs and projects for Indigenous tourism operators and experiences to assist in attracting traveller demand to authentic, Indigenous-owned tourism businesses in Alberta.

Strength of Tourism Demand in Alberta and Canada

Tourism has become one of Canada and Alberta's largest and fastest growing economic sectors. The tourism sector is expected to continue to grow and Canada's best year ever for total international arrivals was in 2018 at just over 21 million visitors with 68% of those visitors from the United States.

Visitors to Canada contributed \$102B in total revenue to Canadian tourism, of this total \$22.1B was directly contributed from the International Market. Domestic tourism expenditures contributed the additional \$80.2B to Canada's total tourism revenue achieved.

Based on 2017 tourism expenditures, the top five overseas markets for tourism in Alberta are (in order): United Kingdom, China, Japan, Australia and Germany.

In 2017, International visitors represent just 3% of travelers to Alberta but represent a significant 14% of expenditures. Travellers within Alberta spend less per visit than US or

overseas visitors however represent 84% of the volume of tourism visitation and almost 55% of all tourism expenditures.

Indigenous Tourism Demand

In 2017 Canada's Indigenous tourism sector contributed \$1.7B in direct economic impact, with roughly 1,875 Indigenous tourism businesses operating across Canada, employing just over 39,000 people. Since the Indigenous tourism sector was surveyed in 2015 there has been a 24% increase in gross domestic product over a three-year period, the number of businesses and jobs also experienced a significant growth of 23% and 18% respectively.

Several research studies have assisted in understanding Indigenous tourism demand:

2019 ITA Supplier Survey – Alberta

In 2019, Indigenous Tourism Alberta (ITA) committed to updating and expanding upon the Indigenous tourism supplier research completed in Alberta in 2017 by the Indigenous Tourism Association of Canada.

Demonstrating a growth in demand, 58% of the businesses indicated their revenues had increased with just 6% saying their revenues had decreased.

2018-19 ITAC Supplier Research – Canada

In 2018, the Indigenous Tourism Association of Canada (ITAC) partnered with The Conference Board of Canada to conduct research into the current state of the Indigenous tourism industry in Canada. This new research follows up from ITAC's previous nation-wide research project undertaken in 2015.

Destination Canada Indigenous Tourism Research

In 2017, the Indigenous Tourism Association of Canada (ITAC) partnered with Destination Canada to research US traveler opinions and understanding of Indigenous tourism in Canada. The report "Aboriginal Tourism US Qualitative Research" summarizes their findings from their in-depth qualitative research conducted to gain a better understanding of US consumer perceptions of Indigenous tourism experiences in Canada.

The researchers reviewed the feedback and input from the focus groups and identified five key findings with implications for the Indigenous tourism industry in Canada.

1. Authenticity is Key - Authenticity appears to be a primary factor when considering Aboriginal tourism experiences.
2. Interest is there, awareness is low - There is an actively engaged group of travellers in the US who have a strong interest in Indigenous cultural experiences. These travellers value travel and unique experiences and are willing to spend money on it. However, awareness and understanding of Indigenous tourism in Canada are low.
3. Indigenous Tourism differentiation - The research indicated that despite low awareness and a general lack of understanding, US travelers believe that Indigenous cultural experiences stand out from more typical travel experiences.
4. Canadian differentiation - The focus groups expressed a sense that an experience in Canada could be more authentic than in the US. There is also an impression that authentic Indigenous tourism experiences can only be found in rural areas, and do not exist in cities.
5. Strong & Compelling Positioning - A business' brand positioning that focused on personal connections and unique experiences resonated best with US travellers in this research. They did not connect with positioning that was seen as too commercial.

ITAC Market Snapshots for Indigenous Tourism

Destination Canada and ITAC partnered on international market research looking at the activities of travellers as well as their interest in Indigenous tourism experiences in Canada. The research covered ten countries in Asia Pacific, Europe, India and North America. This research report reviews the market snapshots for the top international targets for ITA:

United States of America

In 2017, there were 14.3 million arrivals to Canada from the U.S. The U.S. ranks #1 for volume of inbound travel to Canada. Their average length of stay is 4.2 nights and, on average, spend \$738 per person per trip (excluding any air travel). In comparison to 2016, travelers from the U.S. increased 3% in 2017.

Based on Destination Canada research, 18% of travelers from the U.S. took part in an Indigenous experience while travelling in the last three years and one third of this market is interested in an Indigenous cultural experience.

United Kingdom

In 2017, there were 763.7 thousand arrivals to Canada from the United Kingdom (UK). The UK ranks #2 for volume of inbound travel to Canada. Their average length of stay is 9.8 nights and, on average, spend \$1,792 per person per trip (excluding any air travel). In comparison to 2016, travelers from the UK decreased 4% in 2017.

Based on Destination Canada research, 19% of travelers from the UK took part in an Indigenous experience while travelling in the last three years and 37% of this market is interested in an Indigenous cultural experience.

Germany

In 2017, there were 370.9 thousand arrivals to Canada from Germany. Germany ranks #5 for volume of inbound travel to Canada. Their average length of stay is 14.9 nights and, on average, spend \$2,293 per person per trip (excluding any air travel). In comparison to 2016, travelers from Germany increased 5% in 2017.

Based on Destination Canada research, 33% of travelers from Germany took part in an Indigenous experience while travelling in the last three years and 47% of this market is interested in an Indigenous cultural experience.

China

In 2017, there were 672.3 thousand arrivals to Canada from China. The China market ranks #3 for inbound travel to Canada. Their average length of stay is 15.8 nights and, on average, spend \$2,668 per person per trip (excluding any air travel). In comparison to 2016, travelers from China increased a significant 12% in 2017.

Based on Destination Canada research, 27% of travelers from China took part in an Indigenous experience while travelling in the last three years and 35% of this market is interested in an Indigenous cultural experience.

International Research

UNWTO: Report of the UNWTO Panel on Indigenous Tourism: Promoting equitable partnerships was held in Berlin on March 9 2017, featuring a group of successful initiatives of socio-economic empowerment of indigenous communities through tourism based on equitable partnerships. The panelists highlighted the need for a more systematic guidance in the tourism sector regarding a sustainable and responsible development of indigenous tourism.

In December 2019, the UNWTO released Recommendations on Sustainable Development of Indigenous Tourism - adopted by the Resolution A/RES/723(XXIII) of the General Assembly of

UNWTO. According to the report, the goal of the recommendations is to “encourage tourism enterprises to develop their operations in a responsible and sustainable manner, while enabling those indigenous communities that wish to open up to tourism to take full grasp of opportunities that come along, following a thorough consultation process. The recommendations also target tourists that visit indigenous communities, and whose numbers are steadily increasing given the growth of tourism motivated by the interest to experience indigenous cultures and traditional lifestyles.”

Pacific Asia Travel Association (PATA) “Indigenous Tourism and Human Rights in Asia Pacific Region” features an analysis of indigenous tourism around the world and provides a checklist for accountability of key stakeholder groups.

Explorer Quotient Profiles

Destination Canada has developed the Explorer Quotient toolkit that provides businesses with valuable insights into why and how different people like to travel. The Explorer Quotient incorporates traditional market research and looks at the deeper purposes that people choose to travel including personal beliefs, social values, and world views.

Destination Canada’s research indicates that the Explorer Quotient types of visitors that are looking for an Indigenous tourism experience are Cultural Explorers and Authentic Experiences.

Cultural Explorers: From the Destination Canada EQ report, Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit. Personality traits: Open, accepting, non-traditional, enthusiastic, creative.

Authentic Experiencers: Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

Traveller Purchase Behaviour: Path to Purchase

Research shows that most travelers commit to an Indigenous experience after they have arrived at their destination. Results from research led by Destination Canada, lead to the conclusion that for most travelers, engagement in Indigenous tourism experiences is a much valued ‘add-on’ that arises as an unanticipated side benefit in a broader purposed trip.

This has important implications for Indigenous tourism marketing strategies:

1. To take advantage of the trend of travelers purchasing Indigenous experiences while at their destination, focus on purchase points for travelers while on their trip such as visitor information centers, concierge desks and in-market promotions and marketing.
2. To overcome the challenge of travelers generally not pre-purchasing Indigenous experiences, develop partnerships with established products/ experiences and tour operators in order to be considered as an ‘add-on’ experience to purchase pre-trip.

Indigenous Tourism / Travel Trade Partnerships

In 2017, the George Washington University International Institute of Tourism Studies, G Adventures and the Planeterra Foundation worked together to define good practices for travel companies and produced a document “Indigenous People and the Travel Industry: Global Good Practice Guidelines”.

This extensive document includes a list of 15 “Guiding Principles of Responsible Indigenous Tourism”. The principles are offered to be used as the basis for developing new tourism products and experiences. The principles serve as the foundation for the guidelines outlined throughout the document.

Project Overview

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Objectives

ITA's priority objectives or goals of this research are to:

- 1) More fully understand the tourism demand for Indigenous tourism in Canada and, more specifically, in Alberta
- 2) Gain a broader more up-to-date understanding of the tourism demand to allow ITA to develop more effective and relevant programs and projects for Indigenous tourism operators and experiences to assist in attracting traveller demand to authentic, Indigenous-owned tourism businesses in Alberta.

ITA's five-year organizational strategic plan for 2019 to 2024 outlines the organization's goals and priorities to address in order to achieve those goals. As stated in the strategic plan by Board Chair Brenda Holder "The Indigenous Tourism Alberta Strategy 2019-2024 is an opportunity to grow Indigenous tourism spending by \$35 million (25% growth). It will allow industry, partners and governments to come together to grow and strengthen Alberta's Indigenous tourism industry."

The strategic plan for ITA indicates that the tourism marketplace is demonstrating a significant demand for authentic, meaningful experiences. The five-year strategy is designed to respond to this demand through development and marketing of Indigenous experiences that are market and export-ready delivering a meaningful and memorable experience to travellers to Alberta.

The plan outlines three specific strategic priorities and one of the priorities relates specifically to tourism demand:

1. Lead the growth and development of Alberta's Indigenous tourism industry;
2. Develop sustainable market-ready and export-ready Indigenous tourism products;
3. Increase demand for Alberta's Indigenous tourism experiences.

In order to effectively respond to the third priority of increasing demand, this report is designed to first assist ITA in understanding the current demand in order to effectively work towards increasing this demand.

Of the nine Guiding Principles of ITA listed in the five-year plan, the following four principles specifically relate to understanding and increasing tourism demand:

1. Work to enable collective support, promotion and marketing of authentic Indigenous tourism businesses in a respecting protocol.
2. Demonstrate ITA's important contribution to the provincial economy.
3. Partner and collaborate with multi-level destination marketing organizations, individual tourism businesses, sector tourism organizations and government agencies.
4. Develop and deliver strategic priorities based on recent research and tourism market intelligence in Alberta from multiple and highly informed sources.

Strength of Tourism Demand in Alberta and Canada

In the last decade tourism has become one of Canada and Alberta's largest and fastest growing economic sectors. According to Destination Canada, the tourism sector is expected to continue to grow due to consistent economic growth of developed countries, the increased demand for tourism from the millennial traveler segment, and the economic rebound from the 2008-09 global economic downturn.

Based on the most recent Statistics Canada International Travel Survey, 2018 was Canada's best year ever for total international arrivals at just over 21 million visitors with 68% of those visitors from the United States.

The infographic below from Destination Canada shows the breakdown of international origin with the largest percentage gains from India and China. Important to note, the one percent increase from the US seems small but the actual increased number of travelers from the US (143,000) represents almost double the number of travelers than the increases from India and China combined (79,000).

Visitors to Canada contributed \$102B in total revenue to Canadian tourism, of this total \$22.1B was directly contributed from the International Market. Domestic tourism expenditures contributed the additional \$80.2B to Canada's total tourism revenue achieved.



The economic impact of tourism in Canada can be demonstrated to be significant and growing. Total revenues for tourism in Canada exceeded \$102 billion in 2018 which is more than 5% higher than the previous year. Tourism expenditures within Canada by Canadians also grew by 5% over 2017 with just over \$80 billion in GDP. Tourism now earns over 2% of Canada's overall annual GDP and according to Statistics Canada, that is more than agriculture, forestry, fishing and hunting combined (1.5%).

In 2018 over 217,901 tourism businesses supported roughly 739,100 jobs in the tourism industry, with 99% of these businesses being small to medium enterprises.



Tourism is becoming a bigger player in the Alberta economy. The Government of Alberta reports that the Alberta tourism industry represents:

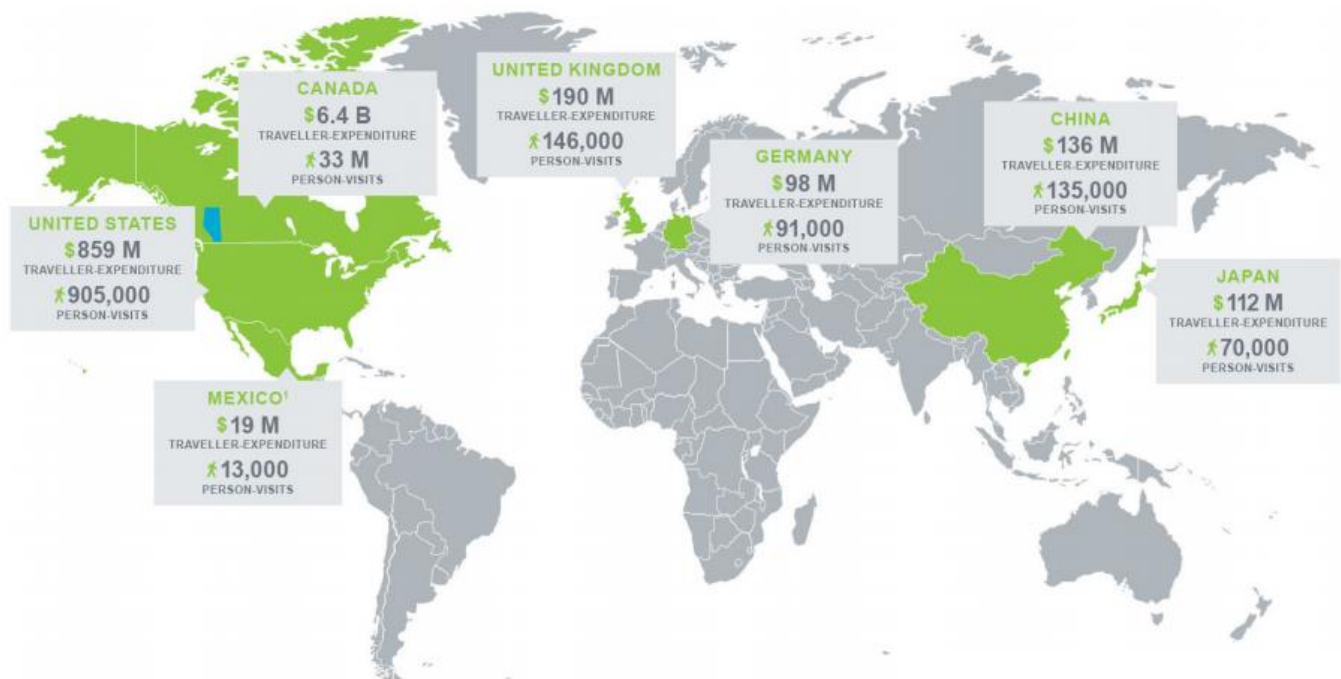
- 127,000 workers employed (more than oil & gas)
- Generates more than 36 million visits
- \$8.3 billion contribution to the provincial economy
- \$4 billion in tax revenue
- 19,000 tourism-related businesses in AB

(Source: Gov't of Alberta site: <http://www.albertacanada.com/business/industries/tourism-about-the-industry.aspx>)

In comparison to the infographic (pg. 7) representing origins of travelers to Canada, the graphic below shows the origins of travelers to Alberta including the number of visitors and their expenditures. This data shows that travelers from within Canada represent 82% of the expenditures of the top seven countries of origin but just \$193 per visitor in spending. In comparison visitors from outside of the Americas represent just 7% of the expenditures but a significant \$1,213 per visitor in spending during their visit.

International visitors represent 6% of travelers to Alberta but represent a significant 25% of expenditures. Based on 2017 tourism expenditures, the top five overseas markets for tourism in Alberta are (in order): United Kingdom, China, Japan, Australia and Germany.

EXPENDITURES FROM TRAVEL ALBERTA INTERNATIONAL MARKETS (2016)



Source: Statistics Canada, International Travel Survey and Travel Survey of Residents of Canada; Research Resolutions and Consulting.
¹Small sample size. Data contain high margins of error, are unreliable, and subject to significant year-over-year fluctuations.

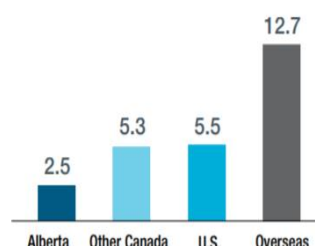
Breakdown of visitation and expenditures for visits to Alberta in 2017. Surprisingly, as compared to 2016, 84% of visitors come from within Alberta and just 3% from overseas.

Average spending per person per visit

Alberta	Other Canada	U.S.	Overseas
\$207	\$471	\$900	\$1,180

Average length of stay

*number of person nights

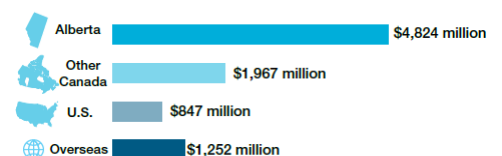


QUICK FACT: Visitors from the U.S. and overseas tend to visit the province more in the summer, with approximately half of total overnight person-visits occurring in July, August and September.

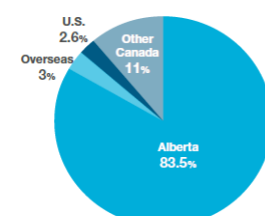
Total expenditures by origin

*same day and overnight

\$8.9 billion total



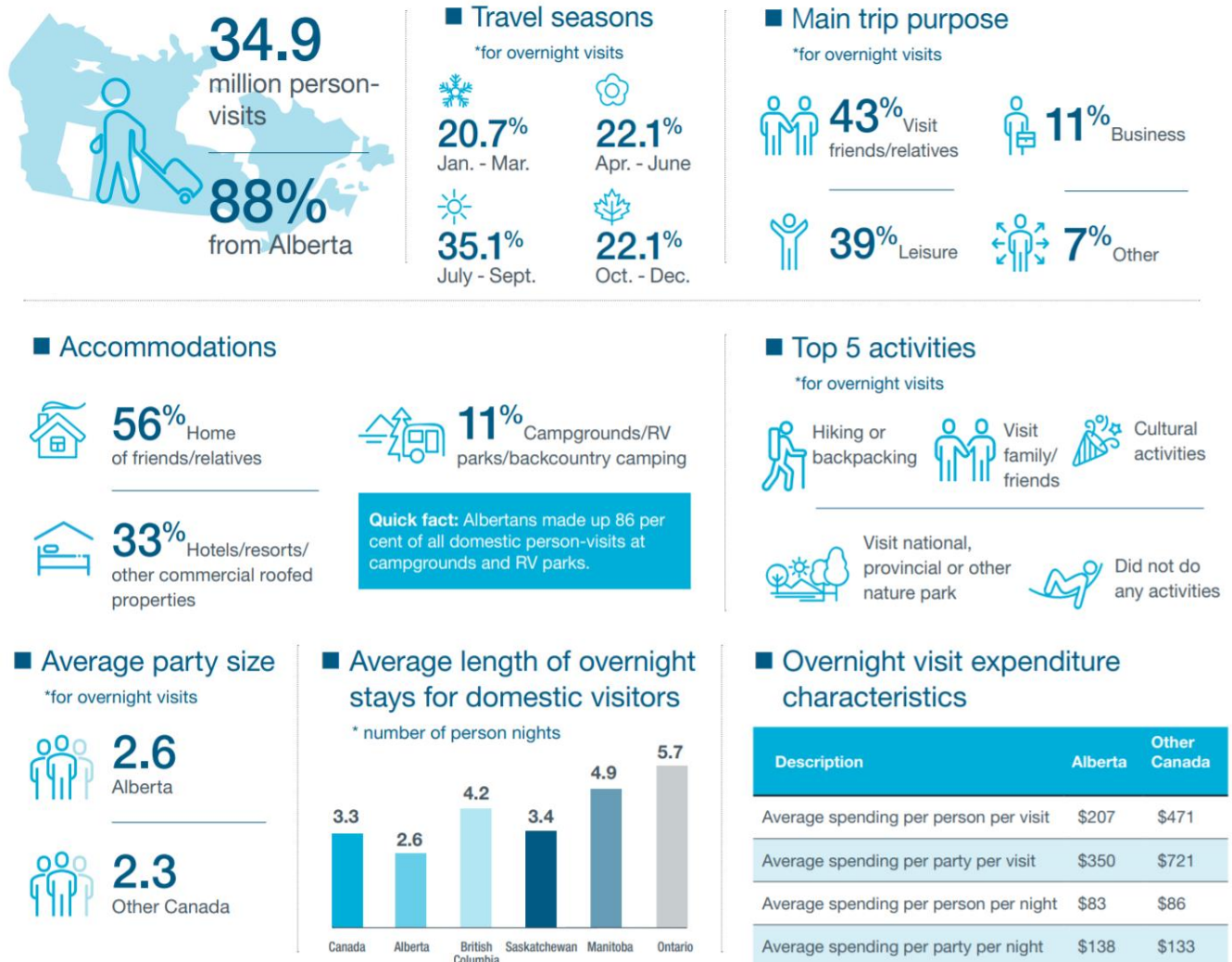
Total visitation by origin



With domestic visitors representing 82% of total tourism expenditures in Alberta, it is important to understand the Canadian visitor regarding timing of their visits, purpose, activities, types of accommodations, length of stay and expenditures.

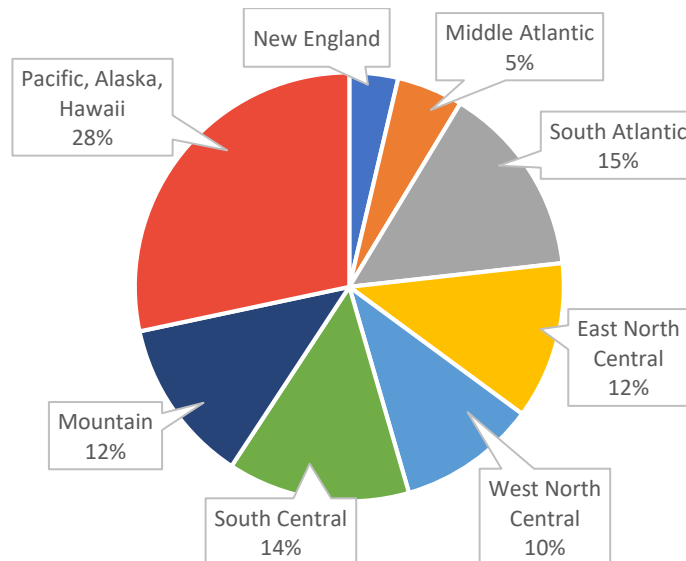
The infographic summary from the Government of Alberta below provides a 2017 overview of visitors to Alberta from within Canada.

Domestic Visitors in 2017



The Domestic Tourism Alberta 2017 profile above is prepared by Alberta Economic Development, Trade and Tourism based on the analysis of the 2017 Travel Survey of Residents of Canada (TSRC) conducted by Statistics Canada. The TSRC provides tourism information for travel in Alberta by domestic visitors from Alberta and other parts of Canada. Data in this publication includes same-day and overnight trips for Albertans and residents from other parts of Canada.

With the second largest group of visitors to Alberta coming from the US, it is valuable to understand the origin of those visitors when considering target marketing. The International Travel Survey by Statistics Canada tracks the origin of visitors to Alberta and the chart below shows the percentage of expenditures from the eight regions of the US.



This table below shows the dollar distribution of spending in Alberta from the eight regions of the US which totals almost \$850 million annually. Growth in expenditures has been 30% over five years including a slight decline from 2016 to 2017. The table shows the growth and decline of some regions over 5 years from 2013 to 2017 inclusive. Regions of significant growth over that time are South Atlantic, West North Central and Pacific/Alaska/Hawaii.

This data is from the International Travel Survey by Statistics Canada.

Residence - US	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
New England	\$34.5	\$31.9	\$38.4	\$42.7	\$31.1
Middle Atlantic	\$60.2	\$39.8	\$51.7	\$60.7	\$42.3
South Atlantic	\$70.6	\$110.5	\$98.7	\$84.3	\$123.4
East North Central	\$74.7	\$123.5	\$139.7	\$129.5	\$100.5
West North Central	\$39.8	\$68.3	\$60.4	\$71.7	\$88.3
South Central	\$82.2	\$63.9	\$87.0	\$115.8	\$116.4
Mountain	\$110.4	\$83.3	\$109.6	\$111.9	\$105.2
Pacific, Alaska and	\$179.8	\$209.9	\$217.9	\$242.8	\$240.0
Total US	\$652.2	\$731.1	\$803.5	\$859.4	\$847.2

The U.S. regions consists of the following:

- New England (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont)
- Middle Atlantic (New Jersey, New York, Pennsylvania)
- South Atlantic (Delaware, Florida, Georgia, Maryland, S. Carolina, N. Carolina, Virginia, Wash. D.C., W. Virginia)
- East North Central (Illinois, Indiana, Michigan, Ohio, Wisconsin)
- West North Central (Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota)
- South Central (Alabama, Kentucky, Mississippi, Tennessee, Arkansas, Louisiana, Oklahoma, Texas)
- Mountain (Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming)
- Pacific, Alaska and Hawaii (California, Oregon, Washington, Alaska, Hawaii)

Indigenous Tourism Demand

Overview

In 2017 Canada's Indigenous tourism sector contributed \$1.7B in direct economic impact, with roughly 1,875 Indigenous tourism businesses operating across Canada, employing just over 39,000 people. Since the Indigenous tourism sector was surveyed in 2015 there has been a 24% increase in gross domestic product over a three-year period, the number of businesses and jobs also experienced a significant growth of 23% and 18% respectively.

Alberta has also seen significant increase in Indigenous tourism with a 75% increase in gross domestic product over a three-year period from \$94.8M in 2014 to \$166.2M in 2017, making Alberta third in Canada in total gross domestic product and third highest in growth.

Destination Canada and the Government of Canada has shown significantly increased level of interest in supporting and promoting Indigenous tourism. In a December 2016 media release from Indigenous Northern Affairs Canada announcing funding to support the development of a national Indigenous tourism strategy, the Government of Canada stated: "This investment will ensure that Indigenous communities can continue to grow the tourism industry, which is shared and celebrated worldwide, differentiating Canada as a unique tourism destination while respecting and strengthening Indigenous traditions and cultures."

Destination Canada Indigenous tourism research in 2016 shows that international travel markets are most interested in:

- Enriching, engaged, immersive experiences with Indigenous people;
- Experiences that are related to nature and learning;
- Authenticity;
- Seeking benefits of 'discoveries' and 'adventures';
- Connection to nature & Indigenous way of life in context of spirituality & cultural traditions;

NOTE: Entertainment oriented experiences and those that distance the traveler from Indigenous people are of lesser value and interest.

The tourism industry has generally accepted definitions that provide guidance in understanding the Indigenous tourism context. The Indigenous Tourism Association of Canada has provided the following three key definitions of three forms of Indigenous tourism in Canada:

Indigenous Tourism – all tourism businesses majority owned, operated and/or controlled by First Nations, Métis or Inuit peoples that can demonstrate a connection and responsibility to the local Indigenous community and traditional territory where the operation resides.

Indigenous Cultural Tourism – meets the Indigenous tourism criteria and in addition, a significant portion of the experience incorporates Indigenous culture in a manner that is appropriate, respectful and true to the Indigenous culture being portrayed. The authenticity is ensured through the active involvement of Indigenous people in the development and delivery of the experience.

Indigenous Cultural Experiences – does not meet the Indigenous tourism criteria (majority Indigenous ownership) however offers the visitor a cultural experience in a manner that is appropriate, respectful and true to the Indigenous culture being portrayed.

2019 ITA Supplier Survey – Alberta

In 2019, Indigenous Tourism Alberta (ITA) committed to updating and expanding upon the Indigenous tourism supplier research completed in Alberta in 2017 by the Indigenous Tourism Association of Canada.

Research Goals:

- Collect current information from active Indigenous tourism businesses
- Expand the information collected to better understand the supply of Indigenous tourism offered in Alberta

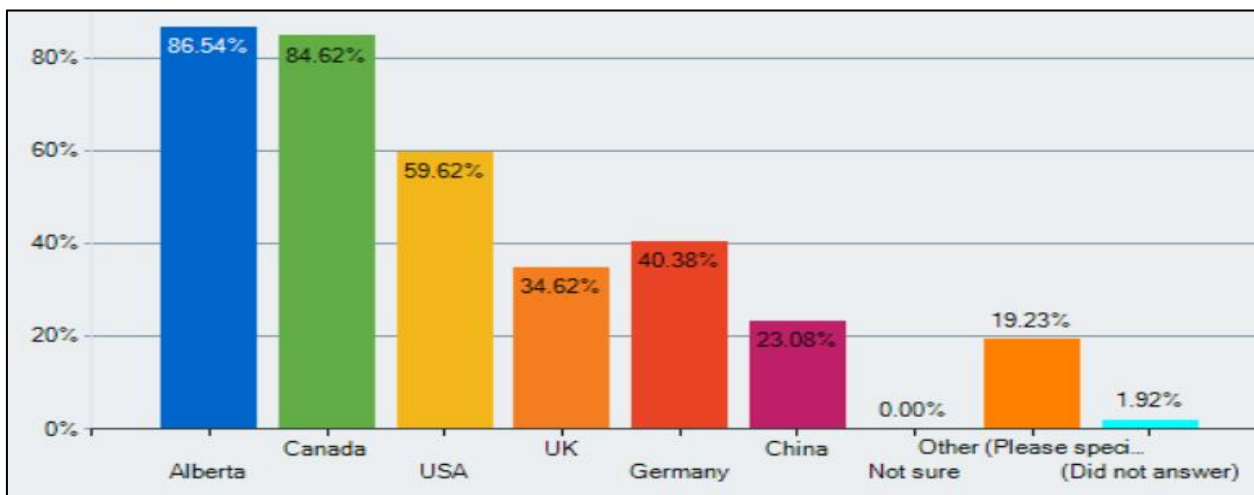
Survey Design - This 2019 version of the supplier/operator survey was designed based on the following key variables:

- Similar to 2017 survey to allow for data comparison
- Expands on 2017 survey to grow understanding and research

The survey design incorporated feedback from key industry and funding partners including Alberta Ministry of Economic Development, Trade & Tourism, Indigenous Services Canada, Western Economic Diversification and Alberta Ministry of Indigenous Relations

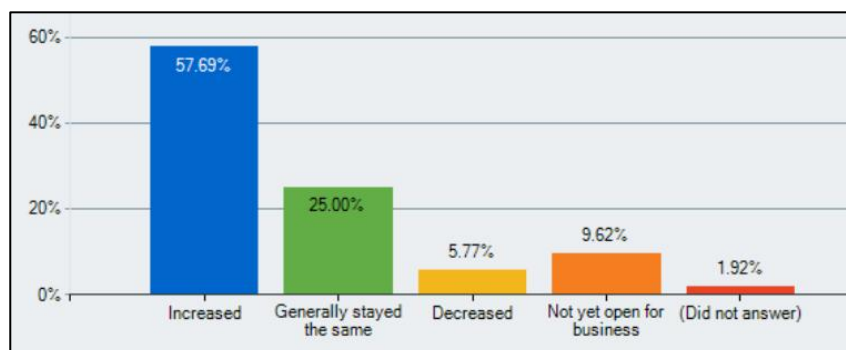
Data collected relating to Consumer Demand:

Target Markets – Respondents were asked to indicate all their primary target markets for their business. The chart below shows a strong alignment with ITA's top five target markets for Indigenous tourism in Alberta: Alberta, rest of Canada, USA, Germany and the UK. Other countries also referenced by the survey respondents were Australia, New Zealand and the Netherlands.



Change in Demand –

Respondents were asked how their revenues have changed over the past three years. Demonstrating a growth in demand, 58% of the businesses indicated their revenues had increased with just 6% saying their revenues had decreased.



2018-19 ITAC Supplier Research – Canada

In 2018, the Indigenous Tourism Association of Canada (ITAC) partnered with The Conference Board of Canada to conduct research into the current state of the Indigenous tourism industry in Canada. This new research follows up from ITAC's previous nation-wide research project undertaken in 2015.

Link to the full report: "Canada's Indigenous Tourism Sector. Insights and Economic Impacts"
https://indigenoustourism.ca/corporate/wp-content/uploads/2019/05/10266_IndigenousTourismSector_RPT.pdf

Research goals of the project:

- To profile and assess the economic impact of Canada's Indigenous tourism sector
- Deliver an updated direct economic footprint of the Indigenous tourism sector in 2017, including GDP, employment, and business growth
- Provides strategic insights from a 2018 survey of Indigenous businesses that participate in the Indigenous tourism sector in Canada

As demonstrated by the research goals listed above, a limited portion of the research investigated marketplace demand trends. The focus of the research was to look at the supply-side of Indigenous tourism in Canada and its economic impact.

Based on the responses from businesses in Alberta as well as the rest of Canada, a comparison can be made to determine if there is a difference in geographic marketing focus by Indigenous tourism operators. The table below shows that the percentages of Alberta businesses with marketing focus on the seven regions offered as options is very similar to the national percentages with identical ranking of the seven options. This research indicates that the top four regions of marketing focus for Alberta as well as Canada are:

- Same province or territory
- Rest of Canada
- United States
- Europe

Marketing Focus of Indigenous Tourism Operators, by Region

(n = 267; per cent)

Province/ territory	Same province or territory	Rest of Canada	United States	Europe	China	Other Asian	Other countries	Total (n)
Alta.	88	61	39	33	18	9	30	33
Canada	88	61	40	30	13	6	18	267

Source: The Conference Board of Canada.

Destination Canada Indigenous Tourism Research

In 2017, the Indigenous Tourism Association of Canada (ITAC) partnered with Destination Canada to research US traveler opinions and understanding of Indigenous tourism in Canada. The report “Aboriginal Tourism US Qualitative Research” summarizes their findings from their in-depth qualitative research conducted to gain a better understanding of US consumer perceptions of Indigenous tourism experiences in Canada.

The overall goals of the research were to:

- Increase demand for Aboriginal tourism experiences; and
- Support Aboriginal tourism businesses in Canada to compete and thrive internationally.

Methodology

Destination Canada engaged Insignia Marketing Research to conduct a total of six in-person focus groups in three cities in November 2016: Dallas, Los Angeles, and Boston.

Key Findings of Research

The researchers reviewed the feedback and input from the focus groups and identified five key findings with implications for the Indigenous tourism industry in Canada.

1. Authenticity is Key

Authenticity appears to be a primary factor when considering Aboriginal tourism experiences.

For participants in this study, that means:

- One-on-one interaction with Aboriginal people, in small, intimate groups
- Learning about cultures, traditions, arts, food, storytelling, and history through active participation
- Connection to nature and the environment

The research recommends that commercialized, highly staged and passive experiences and positioning are to be avoided. The focus groups generally indicated that being a spectator or experiencing something that is highly staged is not of interest.

2. Interest is there, awareness is low

There is an actively engaged group of travellers in the US who have a strong interest in Indigenous cultural experiences. These travellers value travel and unique experiences and are willing to spend money on it.

Awareness and understanding of Indigenous tourism in Canada are low. Travellers say they are interested in participating in an Aboriginal cultural experience, but they are not able to define exactly what they’re looking for or what they would expect to find. There is also a lack of awareness of what Canada and Aboriginal people in Canada have to offer from a tourism perspective.

3. Indigenous Tourism differentiation

The research indicated that despite low awareness and a general lack of understanding, US travelers believe that Indigenous cultural experiences stand out from more typical travel experiences. The focus group participants indicated that they imagined that it could transform a vacation from ordinary to extraordinary, that it will provide long lasting memories and a chance for personal transformation and introspection. The differences are:

- A deeper connection with the environment,
- Experiencing a destination as opposed to just seeing it,
- Involvement in a one-of-a-kind adventure,
- An intimate and personal adventure.

4. Canadian differentiation

Impressions of Indigenous tourism in the US are often negative, with the rationale centering mainly around ideas of commercialism and societal guilt from the historical mistreatment of Indigenous peoples. The focus groups expressed a sense that an experience in Canada could be more authentic than in the US. There is also an impression that authentic Indigenous tourism experiences can only be found in rural areas, and do not exist in cities.

5. Strong & Compelling Positioning

A business' brand positioning that focused on personal connections and unique experiences resonated best with US travellers in this research. They did not connect with positioning that was seen as too commercial.

Recommendations

Based on the findings of this research, an Indigenous tourism business in Canada looking to attract a US traveler should consider the following recommendations:

- Ensure that the culture being represented in an Indigenous tourism experience is shared in genuine and accurate way. This helps visitors feel an authentic connection with the community they are visiting, and better understand how Indigenous people thrive.
- Strive to use accurate language in description copy, including community or nation name. It may also be helpful to provide phonetic spelling where appropriate.
- Focus communications through channels which allow for a more personal level of connection with consumers, such as social media and travel blogs, rather than more commercial advertising.
- Present more hands-on tourism experiences. Focus on visitor learning through active participation, in small, intimate groups. Experiences should be interaction-focused, offering the opportunity for genuine connections with people and with nature. Avoid highly-staged, passive experiences.
- Don't assume American travellers know much about Canada or, in particular, your community. Provide as much information as possible.
- Develop and use a consistent vocabulary in all marketing, communications, product positioning, etc. This will help consumers to better understand who the Indigenous peoples in Canada are, and how to talk about Indigenous tourism experiences when sharing with friends.
- In the consumers' 'path to purchase', there are two key points: 1) increasing consumer awareness when they are thinking about where to go on vacation, and 2) improving industry knowledge and advocacy at local destinations.
- Work closely with the travel trade – educate and collaborate to maximize their influence. This may include providing resources such as photos for marketing materials, geographical information, etc.
- Work closely with destination marketing organizations to promote local awareness and determine the best way for your business to fit into larger itineraries.
- Position products as a highly personal experience rather than a mass-produced one. They should be interaction-focused, offering the opportunity for genuine connections with people and with nature. This will also help with perceptions of authenticity.
- Position products as a “must-do” unique experience in Canada that will offer the traveller a different perspective on a destination that they wouldn't see otherwise.
- Highlight the uniqueness of the Aboriginal culture being shared through each product, and the variety of unique cultures across Canada. This can be highlighted when presenting individual products or in general marketing.

ITAC Market Snapshots for Indigenous Tourism

Destination Canada and ITAC partnered on international market research looking at the activities of travellers as well as their interest in Indigenous tourism experiences in Canada. The research covered ten countries in Asia Pacific, Europe, India and North America.

In alignment with the top target markets identified by ITA for Indigenous tourism in Alberta, the market snapshots for the following market snapshot summaries are provided here from this Destination Canada research:

- USA
- UK
- Germany
- China

United States of America

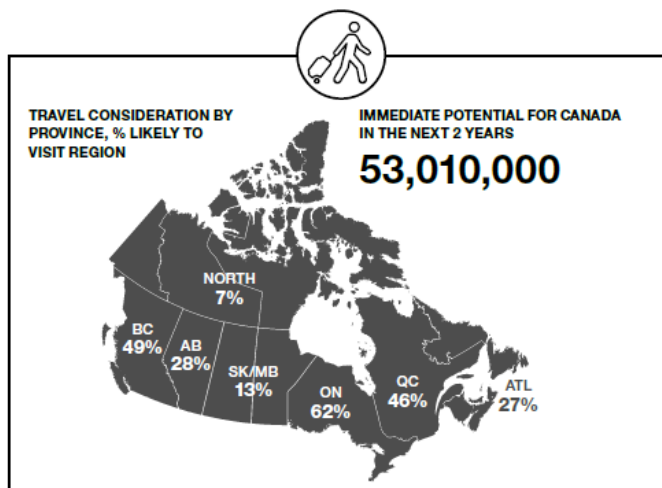
In 2017, there were 14.3 million arrivals to Canada from the U.S. The U.S. ranks #1 for volume of inbound travel to Canada. Their average length of stay is 4.2 nights and, on average, spend \$738 per person per trip (excluding any air travel). In comparison to 2016, travelers from the U.S. increased 3% in 2017.

Based on Destination Canada research, 18% of travelers from the U.S. took part in an Indigenous experience while travelling in the last three years and one third of this market is interested in an Indigenous cultural experience.

The top ten activities of interest for travelers from the U.S. are:

1. Trying local food and drink
2. Natural attractions like mountains or waterfalls
3. Nature parks
4. Hiking or walking in nature
5. Historical, archaeological or world heritage sites
6. Viewing wildlife or marine life
7. Food and drink festivals or events
8. Northern lights
9. Art galleries or museums
10. Shopping for items that help me remember my trip

Note: Although many of the above activities could involve an Indigenous experience, out of 46 possible activities, interest in exploring Indigenous culture, traditions or history ranked #20.



As shown in this map graphic, 28% of travelers from the U.S. are likely to visit Alberta. With a total potential number of travelers to Canada in the next two years of 53.01 million, Alberta can expect approximately 14.8 million visitors to their province with one third or almost 5 million visitors interested in an Indigenous cultural experience.

Sources:
Statistics Canada, International Travel Survey - Frontier Counts (Dec. 2017 and May 2018)
Global Tourism Watch 2017, Destination Canada EQ Profiles

United Kingdom

In 2017, there were 763.7 thousand arrivals to Canada from the United Kingdom (UK). The UK ranks #2 for volume of inbound travel to Canada. Their average length of stay is 9.8 nights and, on average, spend \$1,792 per person per trip (excluding any air travel). In comparison to 2016, travelers from the UK decreased 4% in 2017.

Based on Destination Canada research, 19% of travelers from the UK took part in an Indigenous experience while travelling in the last three years and 37% of this market is interested in an Indigenous cultural experience.

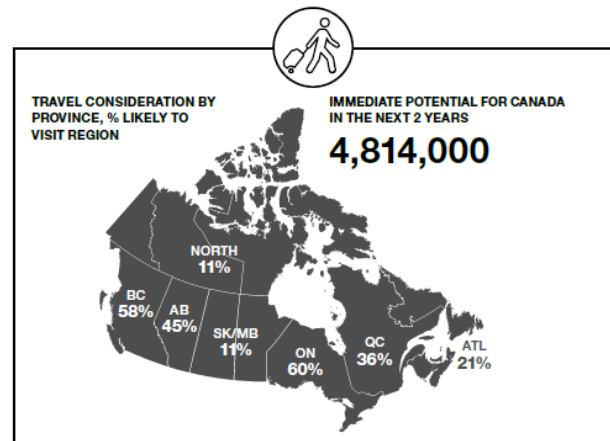
The top ten activities of interest for travelers from the UK are:

1. Trying local food and drink
2. Natural attractions like mountains or waterfalls
3. Viewing wildlife or marine life
4. Nature parks
5. Historical, archaeological or world heritage sites
6. Northern lights
7. City green spaces like parks or gardens
8. Hiking or walking in nature
9. Art galleries or museums
10. Guided city tours

Note: Although many of the above activities could involve an Indigenous experience, out of 46 possible activities, interest in exploring Indigenous culture, traditions or history ranked #13.

As shown in this map graphic, 45% of travelers from the UK are likely to visit Alberta. With a total potential number of travelers to Canada in the next two years of 4.81 million, Alberta can expect approximately 2.17 million visitors to their province with 37% or just over 800,000 visitors interested in an Indigenous cultural experience.

Sources:
Statistics Canada, International Travel Survey - Frontier Counts (Dec. 2017 and May 2018)
Global Tourism Watch 2017, Destination Canada EQ Profiles



UK Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada:

FREE SPIRITS (ages 25 to 34): They are looking for the “it” location to visit and want to sample everything they can while there. Nearly 40% of Free Spirits 25-34 indicated that they would choose their vacation based on a “great deal.” Canada is seen as a friendly, safe place with beautiful outdoor scenery, great outdoor experiences and city activities.

LEARNERS (age 55+): UK Learners 55+ anchor their trips around places that have interesting natural attractions, heritage sites and and wildlife. They are also driven by destinations that offer cultural experiences that are aligned to their interests. They feel that they will be welcomed here - Canada is believed to be a safe place with friendly & welcoming people. Canada is also believed to be a great place to tour multiple destinations.

Germany

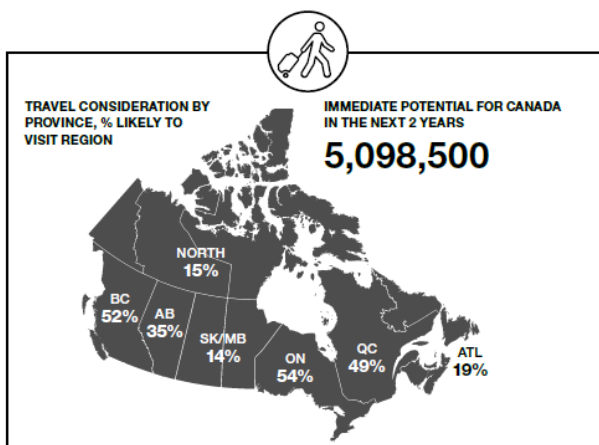
In 2017, there were 370.9 thousand arrivals to Canada from Germany. Germany ranks #5 for volume of inbound travel to Canada. Their average length of stay is 14.9 nights and, on average, spend \$2,293 per person per trip (excluding any air travel). In comparison to 2016, travelers from Germany increased 5% in 2017.

Based on Destination Canada research, 33% of travelers from Germany took part in an Indigenous experience while travelling in the last 3 years and 47% of this market is interested in an Indigenous cultural experience.

The top ten activities of interest for travelers from Germany are:

1. Trying local food and drink
2. Hiking or walking in nature
3. Natural attractions like mountains or waterfalls
4. Nature parks
5. Viewing wildlife or marine life
6. Exploring aboriginal culture, traditions or history
7. Exploring places most tourists won't go to
8. Historical, archaeological or world heritage sites
9. Food and drink festivals or events
10. City green spaces like parks or Gardens

Note: Although many of the above activities could involve an Indigenous experience, out of 46 possible activities, interest in exploring Indigenous culture, traditions or history ranked #6.



As shown in this map graphic, 35% of travelers from Germany are likely to visit Alberta. With a total potential number of 5.1 million, Alberta can expect approximately 1.78 million visitors to their province with 47% or just over 838,700 visitors interested in an Indigenous cultural experience.

Sources:
Statistics Canada, International Travel Survey - Frontier Counts (Dec. 2017 and May 2018)
Global Tourism Watch 2017, Destination Canada EQ Profiles

Germany Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada:

LEARNERS (ages 25 to 34) – Learners are looking for authentic experiences and any opportunity to embrace, immerse and discover themselves in the culture, people and settings of the places they visit. They appreciate spontaneity, unstructured travel and love to learn about and absorb themselves in the culture, history and social ambiance of the places they visit. Generally, they have a large appetite for outdoor activities and Canada's ability to deliver on these experiences is a draw.

FREE SPIRITS (ages 45 to 64) – This group is highly social and open-minded and seek adventurous activity. They seek out experiences that they can not only share with others, but that also say something about them as travellers. They want to disconnect from their everyday responsibilities to relax and prefer authentic experiences.

China

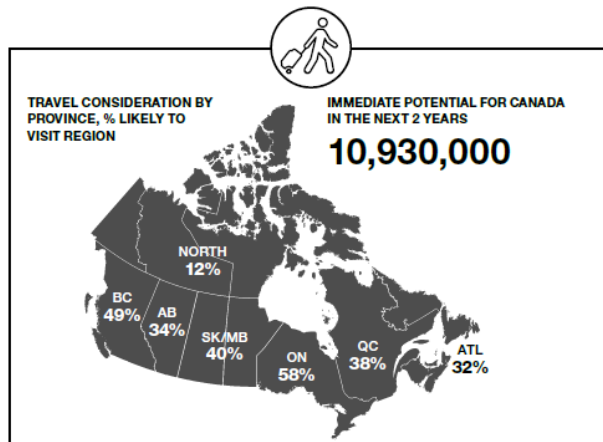
In 2017, there were 672.3 thousand arrivals to Canada from China. The China market ranks #3 for inbound travel to Canada. Their average length of stay is 15.8 nights and, on average, spend \$2,668 per person per trip (excluding any air travel). In comparison to 2016, travelers from China increased a significant 12% in 2017.

Based on Destination Canada research, 27% of travelers from China took part in an Indigenous experience while travelling in the last 3 years and 35% of this market is interested in an Indigenous cultural experience.

The top ten activities of interest for travelers from China are:

1. Natural attractions like mountains or waterfalls
2. Trying local food and drink
3. Historical, archaeological or world heritage sites
4. Nature parks
5. Viewing wildlife or marine life
6. Amusement or theme parks
7. Camping
8. Snowshoeing or cross-country skiing
9. Northern lights
10. Exploring aboriginal culture, traditions or history

Note: Although many of the above activities could involve an Indigenous experience, out of 46 possible activities, interest in exploring Indigenous culture, traditions or history ranked #10.



As shown in this map graphic, 34% of travelers from China are likely to visit Alberta. With a total potential number of travelers to Canada in the next two years of 10.9 million, Alberta can expect approximately 3.71 million visitors to their province and with 35% or just over 1.3 million visitors interested in an Indigenous cultural experience.

Sources:
Statistics Canada, International Travel Survey - Frontier Counts (Dec. 2017 and May 2018)
Global Tourism Watch 2017, Destination Canada EO Profiles

China Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada:

FREE SPIRITS (ages 25 to 34): Chinese Free Spirits are passionate and committed explorers who seek experiences that give them status and recognition. They are “brand name” travellers, who seek out culturally relevant experiences and want to see the icons. They have a strong desire for cultural immersion and group travel - shared experience with family and friends is important. They want to indulge, feel pampered, and do a little of everything. They are motivated to see natural and historical icons.

ASPIRING ESCAPISTS (ages 35 to 44): Chinese Aspiring Escapists are looking for a break from it all - they are stressed about life in general, and want luxurious, worry-free experiences that give them reprieve from it all. They are relatively apprehensive travellers, who seek to relate their experiences to what they know from home. They seek soft adventure experiences that give them the simple pleasures of life but can also give them great stories to take back home.

International Research

UNWTO: Report of the UNWTO Panel on Indigenous Tourism: Promoting equitable partnerships was held in Berlin on 9 March 2017, featuring a group of successful initiatives of socio-economic empowerment of indigenous communities through tourism based on equitable partnerships. The panelists highlighted the need for a more systematic guidance in the tourism sector regarding a sustainable and responsible development of indigenous tourism.

The Executive Director of UNWTO, pointed out that in the context of the current growing demand for authentic travel experiences, indigenous tourism represents a unique product from the point of view of destinations. He stressed that there are at present about 370 million indigenous people, many of whom wish to opt for new sources of income, including tourism, to have their economic potential fully harnessed. In this context, he underlined the importance of involving indigenous communities to give them full ownership and self-determination on their tourism planning and development. The Executive Director described the 2017 International Year of Sustainable Tourism for Development as a key opportunity for putting indigenous tourism high on the international agenda. While underlining the lack of global systematic guidance to foster a sustainable, responsible and ethical development of indigenous tourism, Mr. Favilla announced that the Secretariat was developing a set of recommendations in the field to be submitted for consideration of the World Committee on Tourism Ethics.



In December 2019, the UNWTO released Recommendations on Sustainable Development of Indigenous Tourism - adopted by the Resolution A/RES/723(XXIII) of the General Assembly of UNWTO. According to the report, the goal of the recommendations is to “encourage tourism enterprises to develop their operations in a responsible and sustainable manner, while enabling those indigenous communities that wish to open up to tourism to take full grasp of opportunities that come along, following a thorough consultation process. The recommendations also target tourists that visit indigenous communities, and whose numbers are steadily increasing given the growth of tourism motivated by the interest to experience indigenous cultures and traditional lifestyles.”

Relating to the opportunity of the marketplace demand for Indigenous tourism, the report states “As one of the most thriving economic activities of the 21st century, tourism is well placed to contribute to indigenous people in improving their livelihoods.”

The report list specific opportunities for benefits as a result of responsibly managed Indigenous tourism:

1. Spurs cultural interaction and revival
2. Bolsters employment
3. Alleviates poverty
4. Curbs rural flight migration
5. Empowers local communities, especially women and youth
6. Encourages tourism product diversification
7. Allows people to retain their relationship with the land
8. Nurtures a sense of pride.

The report’s recommendations are divided into two sections; the first one summarizing general considerations on key aspects in indigenous tourism that concern all stakeholders (governments, indigenous communities, destinations management organizations, tourism

companies, civil society, etc.), followed by a section featuring specific recommendations addressing four main groups of stakeholders directly involved in tourism operations on the ground, namely:

- a. Tour operators and travel agencies;
- b. Tour guides;
- c. Indigenous communities; and
- d. Tourists.

One of the key general recommendations in the report outlines five important components and considerations relating to socioeconomic and human rights of Indigenous communities and Indigenous tourism:

1. Respect - Respect cultural values and the cultural capital of indigenous groups
2. Consultation - Engage in a thorough, transparent and permanent consultation process on the planning design and management of tourism projects, products and services
3. Empowerment - Help facilitate skills development and empowerment of indigenous communities through organizational structures and governance models
4. Equitable Partnerships - Support equitable indigenous enterprises and sustainable business practices
5. Protection - Ensure that outcomes of tourism development are positive, and that adverse impacts on natural resources, cultural heritage and the way of life of the communities are timely identified and prevented or eliminated.

Pacific Asia Travel Association (PATA) “Indigenous Tourism and Human Rights in Asia Pacific Region” features an analysis of indigenous tourism around the world and provides a checklist for accountability of key stakeholder groups.

PATA indicates that they recognize the various pressures and threats that many global Indigenous communities face and in collaboration with the World Indigenous Tourism Alliance (WINTA), focus the travel and tourism industry’s attention on the issue through the release of the report on *Indigenous Tourism & Human Rights In Asia & the Pacific Region*.



The primary aim of the report is to support the increased engagement of the Association in the prevention of Indigenous rights’ infractions and violations through tourism development, and in the promotion of Indigenous people’s tourism that is respectful of their traditional and human rights while supporting sustainable development.

Building upon ideas set forth in the Larrakia Declaration, the report aims to advance the discussion on issues relating to human rights and Indigenous tourism:

- To support and maintain Indigenous cultural integrity;
- To ensure equitable benefits are achieved from tourism for Indigenous people; and
- To enhance the richness and vitality of tourist experiences for all involved.

The Larrakia Declaration, endorsed by PATA, the World Tourism Organization (UNWTO), and WINTA, is the tourism industry’s response to the United Nations Declaration on the Rights of Indigenous Peoples to empower the development of Indigenous tourism.

<http://sustain.pata.org>

Target Markets: Explorer Quotient Profiles

Destination Canada has developed the Explorer Quotient toolkit that provides businesses with valuable insights into why and how different people like to travel. The Explorer Quotient incorporates traditional market research and looks at the deeper purposes that people choose to travel including personal beliefs, social values, and world views.

Destination Canada's research indicates that the Explorer Quotient types of visitors that are looking for an Indigenous tourism experience are Cultural Explorers and Authentic Experiences.

Cultural Explorers: From the Destination Canada EQ report, Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit. Personality traits: Open,

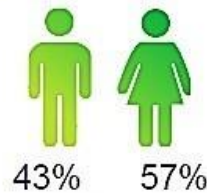
accepting, non-traditional, enthusiastic, creative.

Their top defining values of who they are: Importance of Spontaneity - They enjoy an element of surprise and welcome unexpected circumstances that enrich their lives. Cultural Sampling - They believe that other cultures have a lot to teach them. Adaptability to Complexity - They are not threatened by the changes and complexities of society. In fact, they embrace complexity as a learning experience and a source of opportunity. Pursuit of Novelty - Trying out new things is thrilling! Personal Control: They feel in control of their lives and not afraid to take on moderate risk if it means they can learn something new. Personal Escape - They long for that which is beyond the practical and they want to be transported from their everyday life.

Personal Challenge - They set difficult personal goals for themselves at work and at play and will finish what they start.

The bottom defining values of who they are: Confidence in Big Business - Their tendency to reject authority leads them to question those in leadership positions, including big

Demographics



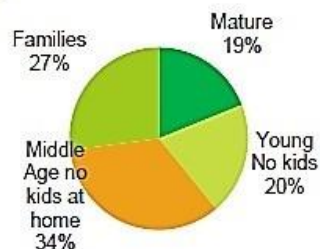
Education: Higher than average

Employment: FT, lower than avg.
% are retirees

Household Income: Average



Lifestage



© 2012 Canadian Tourism Commission

businesses which they do not believe have better quality simply because they are larger/better known.

Conformity to Norms - They like to be unique, different from others and love to share their ideas and creativity. Ostentatious Consumption - They are not highly materialistic and are offended by ostentatious consumption.

Travel Values: The Cultural Explorer is an avid traveller who values learning and discovery while travelling. They don't want to feel like a "tourist," preferring just to blend in and have the most authentic experience possible rather than being confined to group tours and schedules. A Cultural Explorer will seek: constant travel; living history/culture; the beauty of nature; fun, shared experiences; going with the flow. A Cultural Explorer will avoid: luxury/comfort-seeking; group/checklist travel.

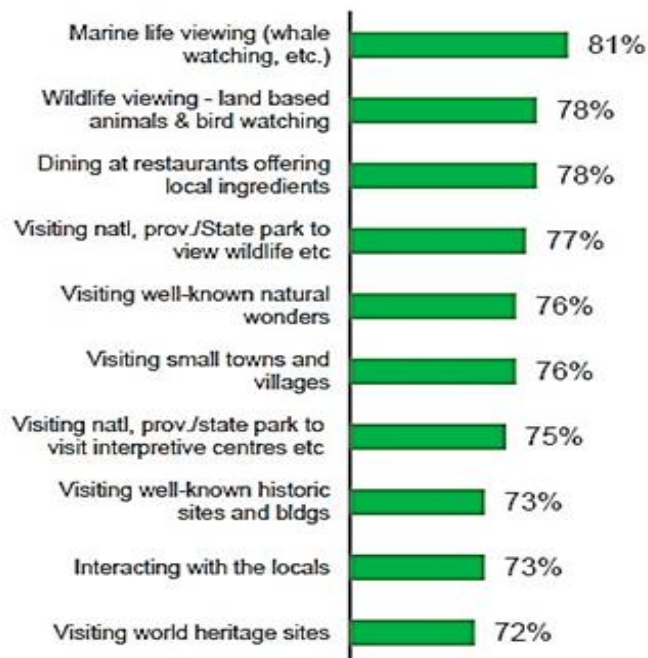
Experiences: Cultural Explorers are more likely than other travelers to be interested in:

1. Nature Observation Activities
2. Exhibits, Architecture, Historic Sites/Buildings, Museums
3. Sightseeing Activities
4. Accommodation-related Activities
5. Water-based Outdoor Activities
6. Hands-on Learning Activities
7. Festivals, Events & Spectator Sports
8. Outdoor/Nature Sports & Activities
9. Winter Outdoor

Activities Cultural Explorers are also interested in:

1. Shopping, Dining and Other Food-related Activities
2. Entertainment, Performing Arts and Amusement Parks
3. Cruises & Touring

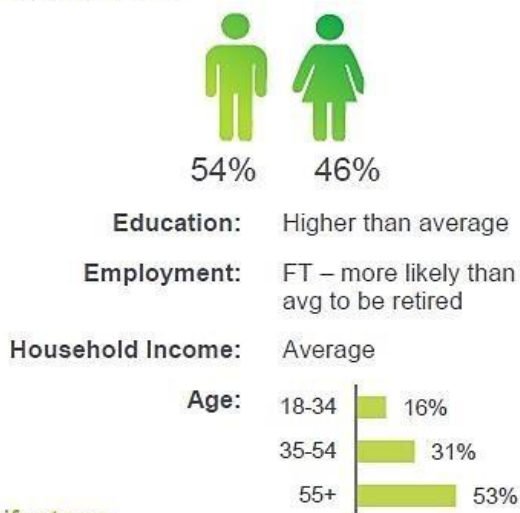
Top 10 Most Appealing Activities Among Cultural Explorers:



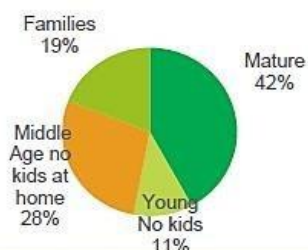
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Authentic Experiencers: From the Destination Canada EQ report, Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

Demographics



Lifestage



© 2012 Canadian Tourism Commission

The top defining social values: Personal Control - They focused on maintaining a sense of autonomy and self-direction in their lives. Many are retired, with time to do the things they want to do. Importance of Spontaneity - They enjoy surprises and the unexpected – they will welcome those that help them learn more about themselves and the world. Culture Sampling - They show a tendency to incorporate foreign cultures into their lives, like going to an Inuit art gallery or dining at a Thai restaurant. Everyday Ethics - They feel it's important to be responsible, upstanding citizens. Skepticism towards Advertising - Their tendency to question authority, extends to commercials trying to sell something. They believe that individuals are responsible for their own decisions. Ecological Concern - They are concerned about the health of the planet and what that means to future generations. The bottom defining vales: Joy of Consumption - Although they are relatively affluent and confident financially, they are not avid consumers.

Living Virtually - They want to connect with the real world authentically and are not content to do so by way of TV, computers or the internet. Importance of Brand - They care little about brands – but they're not afraid to pay for quality if it matches their values.

Travel Values: The Authentic Experienter is a more learned, understated traveller. Travel is not their only interest in life, but they certainly appreciate it when they go. They prefer to do their own thing while at a destination, having control over what they see and when they see it.

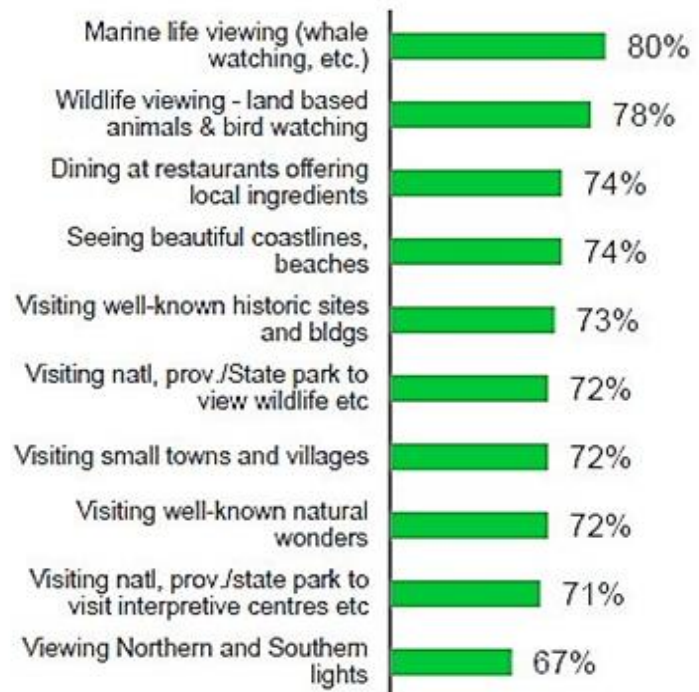
An Authentic Experienter will seek: Living History/Culture: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures, of the places they visit. To Understand Cultural Differences: While they are not high on the trend Comparison Travel, they love to observe the difference between destinations. An Authentic Experienter will avoid: Hedonistic Rejuvenation/Comfort-seeking: This EQ type does not shy away from living like the locals do. They like to be in control while they vacation, and don't need to be pampered and have everything taken care of for them. Escape: These travelers do not feel overwhelmed by life. Travel is not about escape for them, but about personal development and learning instead.

Experiences: Authentic Experiencers are more selective in the experiences they find appealing to do on a long-haul trip. Authentic Experiencers are more likely than other travelers to be interested in "Exhibits, Architecture, Historic Sites/Buildings, Museums."

Authentic Experiencers are also interested in:

1. Nature Observation Activities
2. Sightseeing Activities
3. Shopping, Dining and Other Food-related Activities
4. Entertainment, Performing Arts and Amusement Parks
5. Accommodation-related Activities
6. Cruises & Touring
7. Water-based Outdoor Activities
8. Hands-on Learning Activities
9. Festivals, Events & Spectator Sports
10. Outdoor/Nature Sports & Activities
11. Winter Outdoor Activities

Top 10 Most Appealing Activities Among Authentic Experiencers:



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Traveller Purchase Behaviour: Path to Purchase

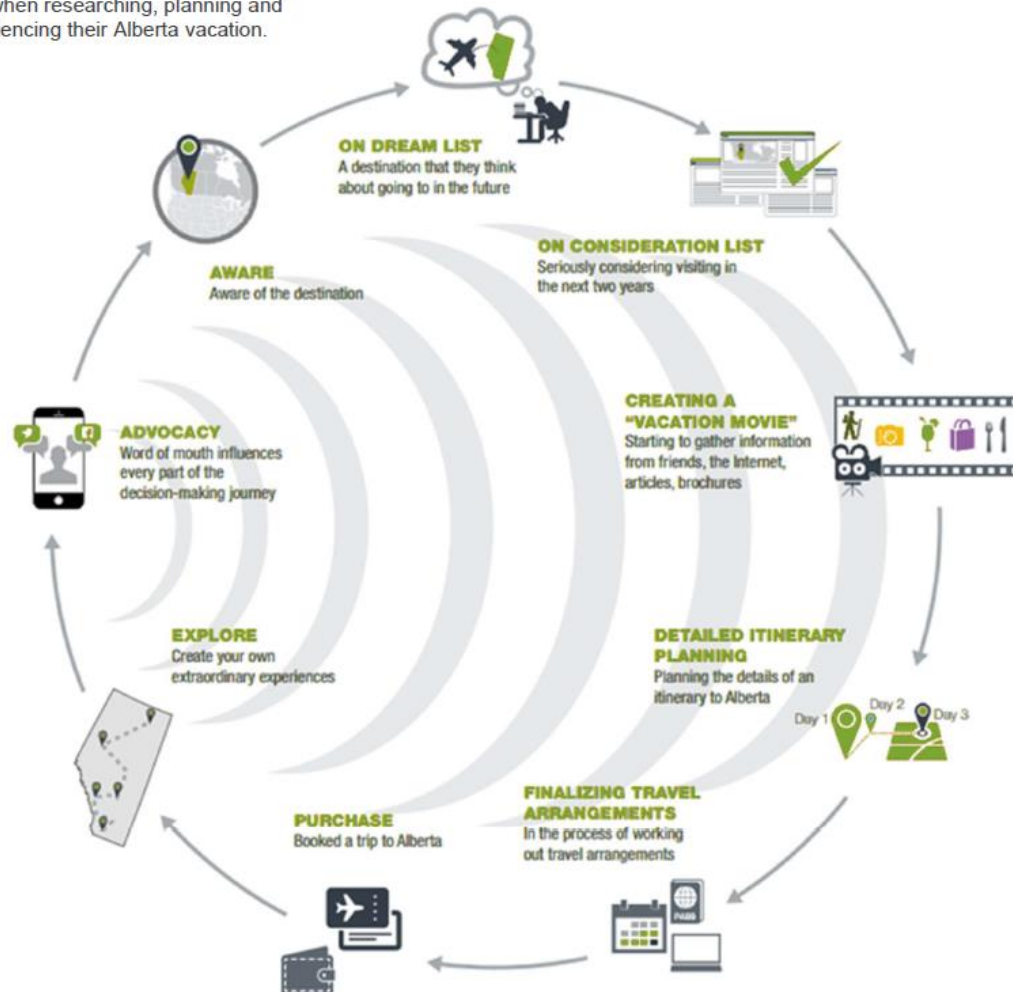
The majority of travelers commit to an Indigenous experience after they have arrived at their destination. Results from research led by Destination Canada, Travel Yukon and the Travel Activities and Motivation Survey Aboriginal Tourism Report lead to the conclusion that for most travelers, engagement in Indigenous tourism experiences is a much valued 'add-on' that arises as an unanticipated side benefit in a broader purposed trip. Indigenous tourism opportunities are normally sought out while on trips, as opposed to during the pre-trip destination planning process.

This has important implications for Indigenous tourism marketing strategies:

1. Take advantage of the trend of travelers purchasing Indigenous experiences while at their destination, focus on purchase points for travelers while on their trip such as visitor information centers, concierge desks and in-market promotions and marketing.
2. Overcome the challenge of travelers generally not pre-purchasing Indigenous experiences, develop partnerships with established products/ experiences and tour operators in order to be considered as an 'add-on' experience to purchase pre-trip.

Traveller Path to Purchase

Outlines the key steps leisure travellers take when researching, planning and experiencing their Alberta vacation.



Indigenous Tourism Alberta Strategy 2019 – 2024

Travel Industry and Indigenous Tourism Partnerships: Recommended Practices

In 2017, the George Washington University International Institute of Tourism Studies, G Adventures and the Planeterra Foundation worked together to define good practices for travel companies and produced a document “Indigenous People and the Travel Industry: Global Good Practice Guidelines”. The guidelines are intended “to encourage responsible conduct and guide good business practices that serve and protect the interests of Indigenous communities and travel companies as well as produce visitor experiences that are authentic, respectful and rewarding.”

This extensive document includes a list of 15 “Guiding Principles of Responsible Indigenous Tourism”. The principles are offered to be used as the basis for developing new tourism products and experiences. The principles serve as the foundation for the guidelines outlined throughout the document.

1. Full and Effective Participation - Ensure that Indigenous communities and suppliers participate in all strategic discussions and share decision-making based on the dictates of their traditional laws and customs.
2. Equitable Engagement - Make certain that Indigenous communities are treated as equal business partners and clearly understand the implications of all arrangements to ensure equitable participation. The Indigenous communities themselves, rather than the travel company, should determine the level of their involvement in tourism activities.
3. Informed Consent - Inform Indigenous communities of any activities that may affect their well-being and to ensure that they are free to exercise their right to self-determination.
4. Business Values - Respect traditional values, customs and conventions in all business transactions.
5. Local Purchasing - Give priority to Indigenous suppliers when purchasing and offering goods and services. These suppliers should be treated fairly and promoted appropriately.
6. Community Support - Ensure fair and equitable business relationships with Indigenous communities or suppliers and provide direct employment and skills training opportunities.
7. Local Ownership - Ensure Indigenous community members own and derive direct benefits from tourism products and services.
8. Decent Work - Respect labor rights, provide safe and secure working environments for employees and ensure minimum payment of a living wage and offer opportunities for advancement.
9. Customary Laws and Practices - Understand, respect and accept traditional norms, land ownership rights and management systems.
10. Traditional Knowledge - Make every effort to ensure that traditional knowledge and its representations—including artwork, crafts, ceremonies, rituals, performing arts and all intangible assets—are protected from commercial exploitation. Tour operators should only use Indigenous communities’ traditional knowledge with full community consent.
11. Protection of Cultural Heritage - Ensure that traditional lands, territories, sacred sites and resources are used with communities’ full knowledge and consent and protected against exploitation.
12. Monitoring and Evaluation - Travel companies should ensure a process is in place to track the impacts of the business relationship in order to minimize potential negative outcomes and ensure positive results. Also, ensure a process is in place for resolving potential grievances.
13. Cultural Interaction - Promote respectful visitor-host interactions that foster cross-cultural understanding and don’t disrupt daily routines.
14. Collaborative Interpretation - Ensure that all storytelling and narratives told about Indigenous communities are accurate and defined and approved by the Indigenous community itself, with respect and appreciation for traditional languages.
15. Stewardship of Heritage - Work toward conserving natural and cultural resources and assist Indigenous communities to steward and protect these assets.

Appendix

- Canada's Indigenous Tourism Sector. Insights and Economic Impacts
https://indigenoustourism.ca/corporate/wp-content/uploads/2019/05/10266_IndigenousTourismSector_RPT.pdf
- 2017 Alberta Indigenous Tourism Online Survey
- 2019 Alberta Indigenous Tourism Online Survey
- Indigenous Tourism Alberta Strategy, 2019-2024
- 2019 Market Snapshots: Understanding the Opportunity for Indigenous Tourism Business in Canada
- Aboriginal Tourism US Qualitative Research
- Planeterra Foundation and George Washington University Report – Indigenous People and the Travel Industry: Global Good Practice Guidelines
- UNWTO Report - Recommendations on Sustainable Development of Indigenous Tourism, produced by the World Committee on Tourism Ethics