



Stabilize and Rebuild

Teresa Ryder, Director of Business Development
Indigenous Tourism Association of Canada

INDIGENOUS
TOURISM ASSOCIATION OF CANADA



ASSOCIATION TOURISTIQUE
AUTOCHTONE
DU CANADA

Industry focused, industry led

National non-profit

**Membership base of Indigenous
owned and controlled businesses**

**13 elected board members representing
industry from across Canada**



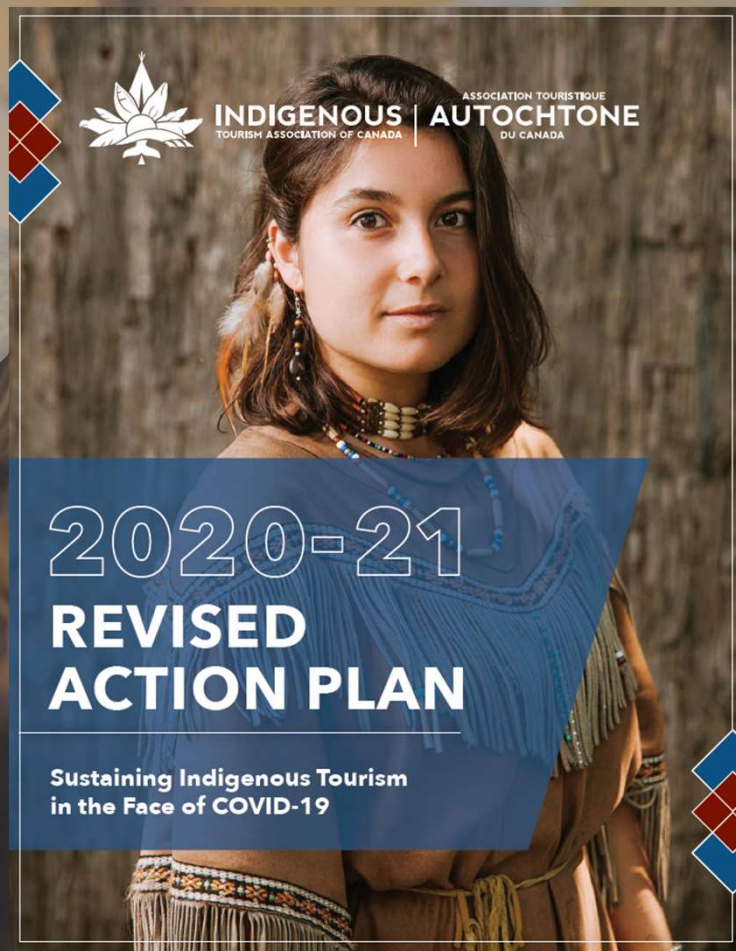
Our Mission

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

Our Vision

A thriving Indigenous tourism economy sharing authentic, memorable and enriching experiences

ITAC's Response to the Pandemic

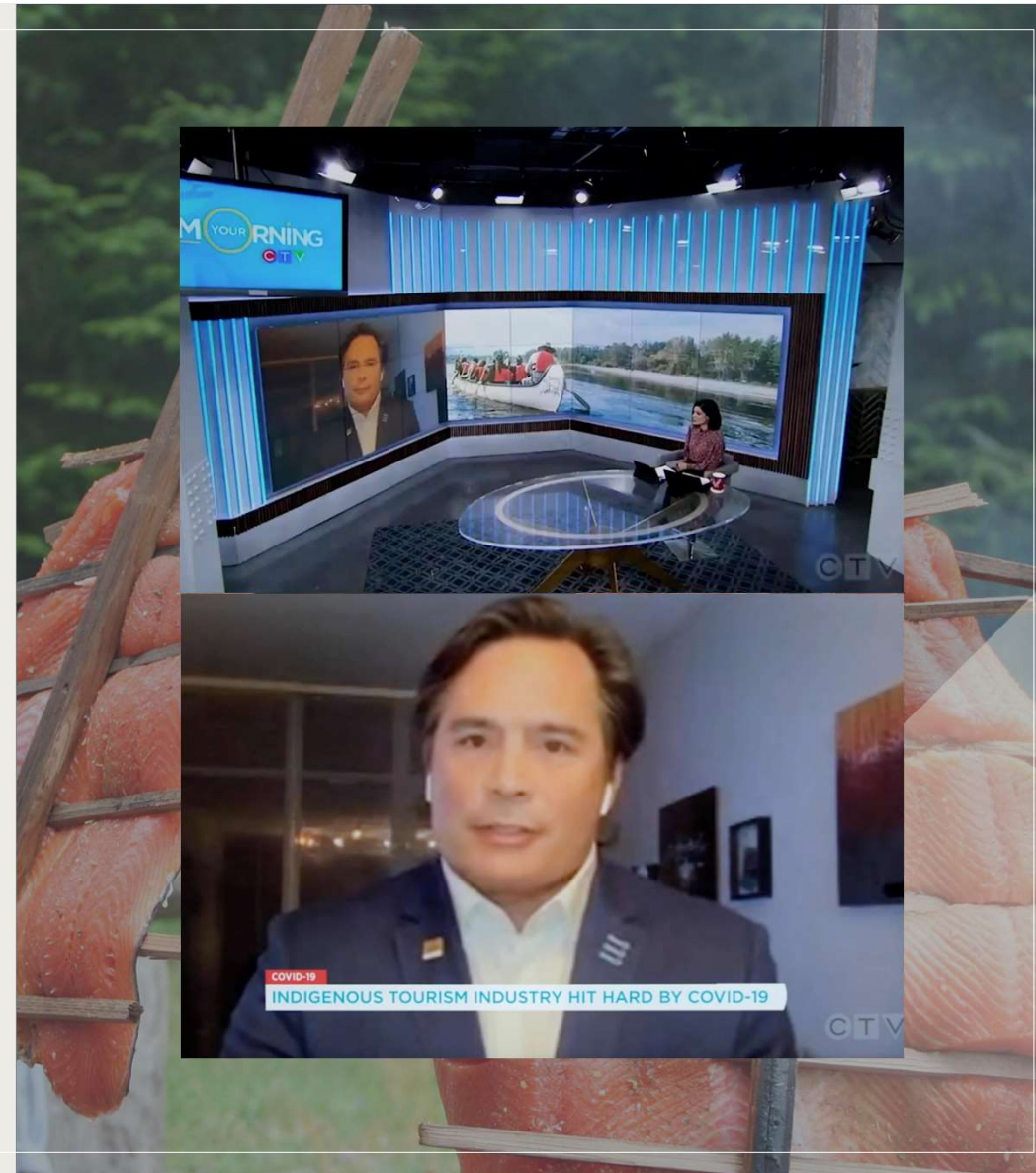


A New Action Plan and a Domestic Focus

- The existing 2020-21 Action Plan was revised in response to COVID-19, and new targets have been created
- Key Performance Indicators have been adjusted to reflect the current situation surrounding travel to Canada and how it affects ITAC members
- Pivoted from international marketing to domestic marketing with hyper-local awareness campaigns

Advocacy and Outreach

- ITAC was forced to respond on behalf of its membership to ensure fair and equal access to federal support programs
- Advocacy work is ongoing to ensure that ITAC members are able to get financial assistance regardless of where they are located in the country or if they are on-reserve or a community-owned business
- Stimulus funds of \$557 million in longer term refinancing tools plus \$16 million for short term grants was identified to ensure the industry can immediately stabilize and rebuild effectively



IMPACT OF COVID-19

on the

INDIGENOUS TOURISM INDUSTRY

Indigenous tourism is one of the **LARGEST SINGLE EMPLOYERS AND ECONOMIC DRIVERS** of Indigenous communities in Canada



As of 2019, contributed more than **\$1.9B ANNUALLY** in direct GDP

That's up from **\$1.4B IN 2015**

NATIONAL STATS BEFORE COVID-19



1,700

Indigenous tourism businesses



\$1.6 BILLION

Direct GDP from Indigenous tourism businesses



36,000

Indigenous tourism industry employees

COVID-19 ESTIMATED IMPACT



714



\$1.07 BILLION



21,396

Measuring the Impact

- ITAC partnered with The Conference Board of Canada (CBoC) to conduct research to assess the impact of COVID-19 on Indigenous tourism operators
- The CBoC research showed that the industry will experience at least a 65.9% decline in direct GDP (down to \$555 million) and a 59.4% decline in employment (down to 14,624 jobs)
- The CBoC will reassess the industry in the spring of 2021

Expected Losses in Direct GDP by Province/Territory

British Columbia: **\$174M**

Newfoundland & Labrador: **\$32M**

Alberta: **\$96M**

Nova Scotia: **\$22M**

Saskatchewan: **\$83M**

New Brunswick: **\$16M**

Manitoba: **\$27M**

Prince Edward Island: **\$2M**

Ontario: **\$327M**

Nunavut: **\$81M**

Québec: **\$115M**

Northwest Territories: **\$71M**

Yukon: **\$2M**

ITAC Stimulus Grant Program

- Over 678 Indigenous tourism business owners from across Canada have been provided with \$16.212 million in grants
- The fund is providing businesses with grants of up to \$25,000 each
- Grants were distributed in six phases from May to October

PHASE FIVE FUNDING ITAC COVID-19 STIMULUS DEVELOPMENT FUND

October 1, 2020

With the support of the Federal Government of Canada's \$16 million stimulus grant fund, the Indigenous Tourism Association of Canada (ITAC) is continuing to provide relief to many Indigenous tourism operators across the country with its COVID-19 Stimulus Development Fund.

After providing funding to hundreds of businesses and entrepreneurs this summer to help them cope through COVID-19 shutdowns, ITAC is now providing financial assistance to an additional 103 tourism operators. These businesses will receive funding totalling over \$2.448 million in the form of non-repayable grants of up to \$25,000. "This funding will help Indigenous tourism businesses weather COVID-19 by supporting businesses as they seek out new ways of operating in a changed world," said Honourable Marc Miller, Minister of Indigenous Services.

With this announcement, ITAC has provided assistance to 454 unique Indigenous tourism businesses with funding totalling \$10,795,700. Phase Six, the final round of funding, is still to come and will support even more Indigenous tourism businesses across the country.

It is uplifting to be able to help Indigenous tourism operators and entrepreneurs through these uncertain times and provide them with the support they need to stay afloat during the pandemic and plan for future growth.

Keith Henry, B. ED
President & CEO, Indigenous Tourism Association of Canada



IndigenousTourism.ca/corporate

ITAC Stimulus Grant Program

Reported Key Findings:

- 93% of businesses reported a negative or significant negative impact on their business as a result of COVID-19
- 28% of businesses changed or adapted their product offering as a response to COVID-19
- Lodging and Accommodations reported the highest % of businesses that were able to sustain operations through 2021
- 33% of respondents were Indigenous women
- 62% of businesses are currently closed impacting 75-100% decline in revenues

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ITAC Stimulus Grant Program

Reported Key Findings:

- Most reported activities for use of ITAC funds are adapting business offerings to maintain jobs, re-establishing jobs lost from COVID-19, adjusting working hours or compressing the work week
- 53% of businesses report that they will be able to return to pre-COVID staffing levels based on maintaining 2021 bookings (so far)

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ITAC Stimulus Grant Program

Reported Key Findings:

- Respondents reported 41% of their usual workforce for the reporting period (Apr 2020-Dec 2020) are currently laid off
- 15% of businesses that had anticipated they would be able to return to pre-COVID staffing levels no longer anticipate that this is the case
- 51% of businesses under-estimated their expected losses from when they applied for COVID-19 Stimulus Grant to when they reported on their grant.



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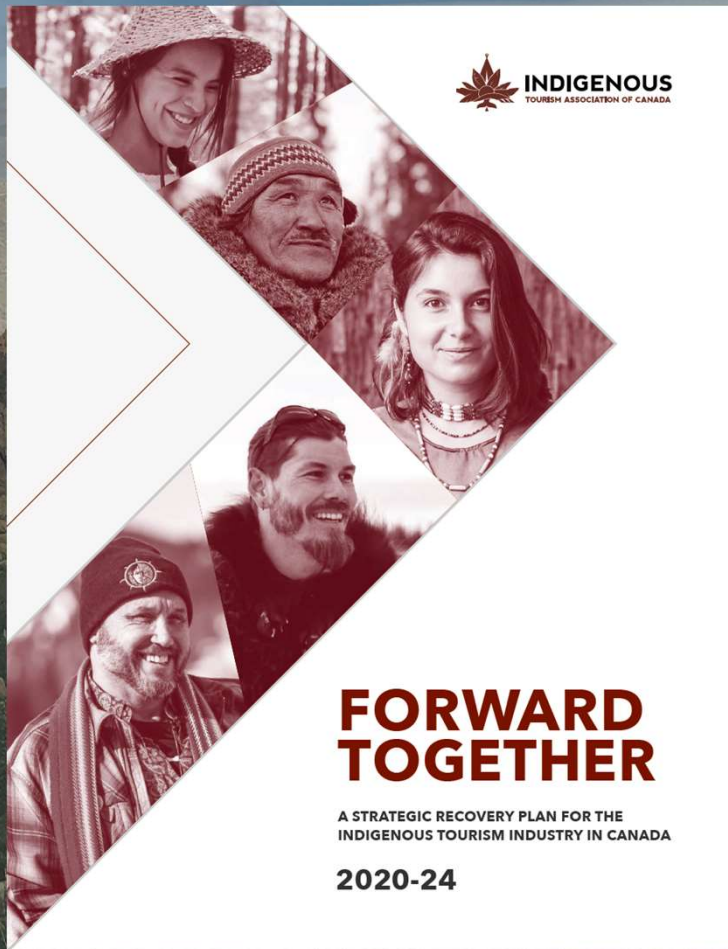
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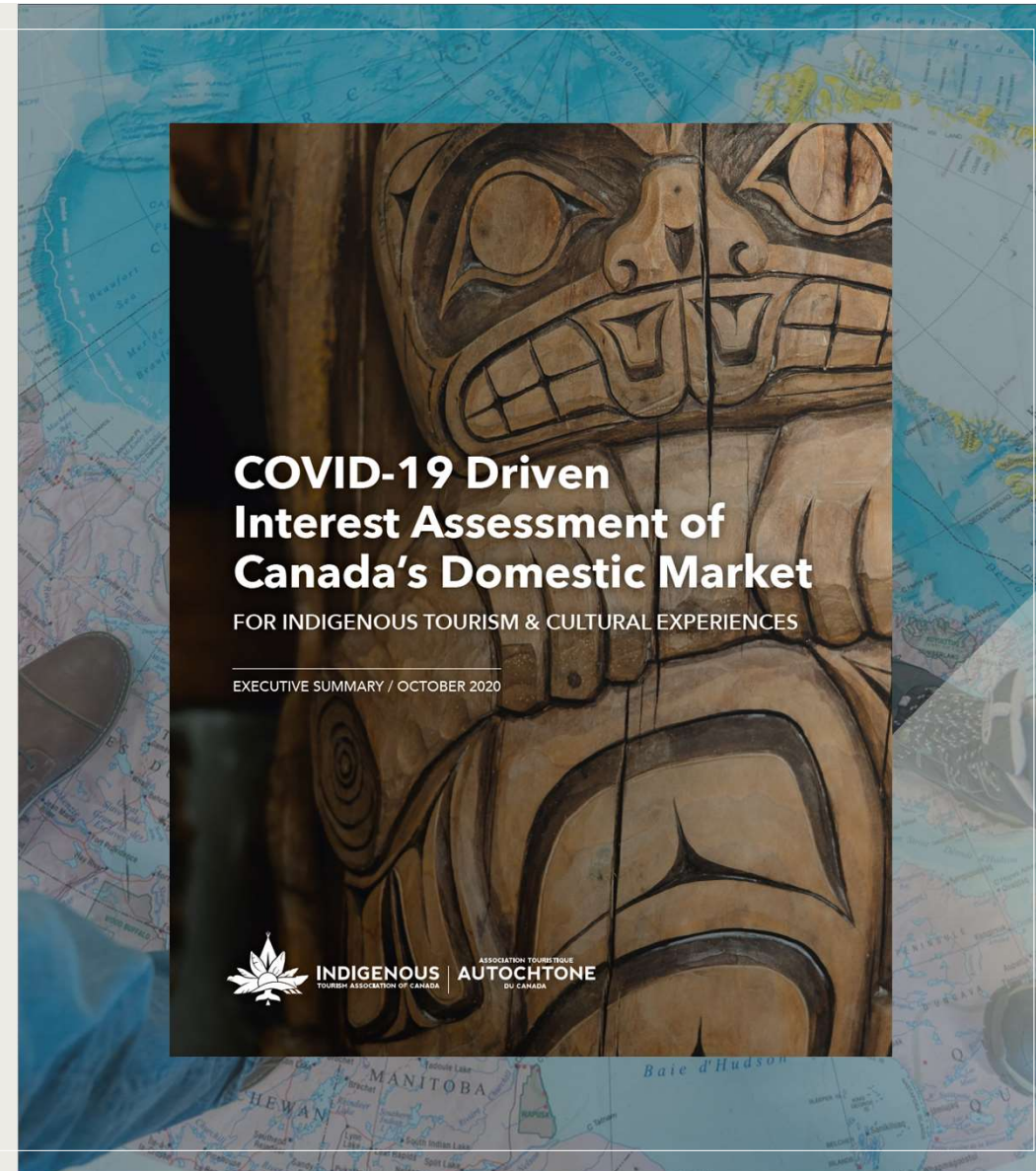


A New Strategic Plan

- ITAC developed a new 5-year strategic plan to sustain the Indigenous tourism industry through Response, Recovery and Resilience phases

Using Research to Refine Direction

- ITAC commissioned Insignia Marketing Research to conduct research to understand both the relevance and potential of Indigenous tourism and cultural experiences within the domestic travel market
- The objective was to understand the COVID-19 domestic traveller's mindset, need-states and behaviours to drive interest and engagement in or including Indigenous tourism and cultural experiences in near future travel plans



Insignia Research Highlights

Attitudes have shifted to embrace a slower, more mindful pace of life with loved ones—appreciating nature, simplicity, spirituality and soulfulness

Travel-related behavioural shifts include a major surge in road trips taken within province

A COVID-19-specific domestic travel strategy and executional plan is needed

Federally, there needs to be more resources placed on leveraging the value of Indigenous tourism and cultural experiences

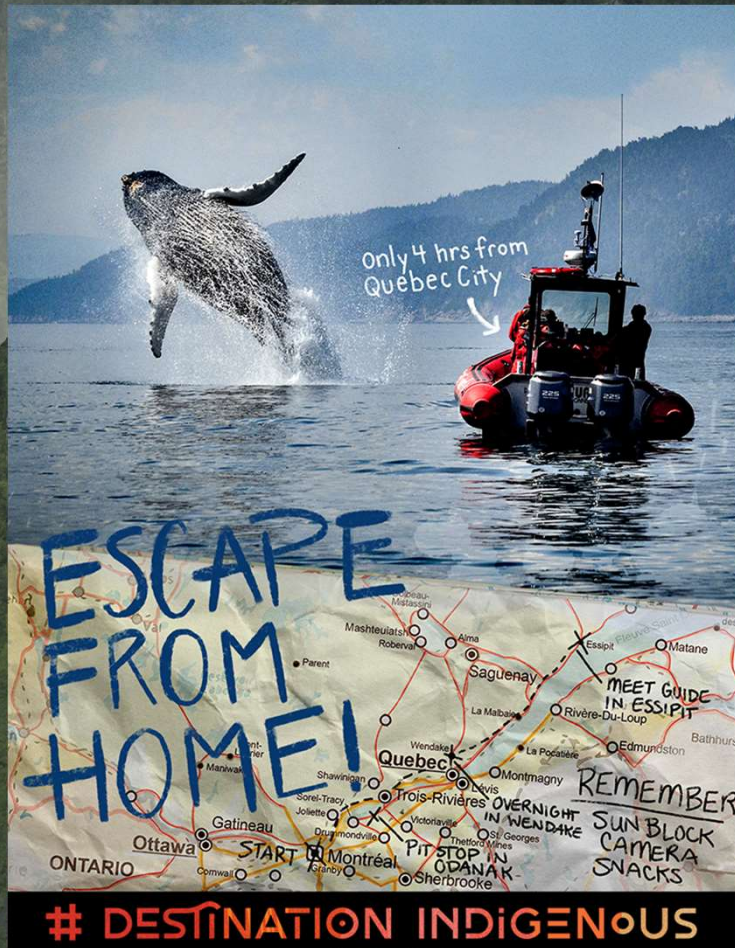
Insignia Research Highlights

Invest in optimising the digital experience to ensure all offerings have prominent positioning to increase reservations

Develop a step-by-step tool kit specifically designed for grassroots and guerilla tactics

Become highly visible and alluring to travellers by speaking to their COVID-19 need-states and be the hidden gem experience they are after

Press for recognition on all local Destination Marketing Organisation and Provincial Marketing Organisation websites



Escape From Home Domestic Marketing Campaign

- 7-week campaign utilizing social media influencers and paid advertising to drive traffic to the Destination Indigenous websites and onward to member businesses to book experiences

Overall Results

Impressions: 12,747,414

Engagement: 202,213

Conversions: 4,588

New Social Followers: 4,810



Addressing the Second Wave of COVID-19

- ITAC is now pivoting to address the current reality that could not be predicted six months ago. This includes:
 - creating new solutions to sustain member businesses
 - member helplines, tools and training
 - online booking functionality
 - new domestic marketing campaigns



Awareness Videos

Combined Views: 153,037



Virtually Yours



We Missed You



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