AtBC Blueprint Strategy

Tourism Performance Review 2006-2010

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Table of Contents

List of Figures

List of Tables

AtBC **Blueprint Strategy**
Tourism Performance Review 2006-2010
Results Snapshot

In 2005, the Aboriginal Tourism Association of BC (AtBC) completed the development of its Aboriginal Cultural Tourism Blueprint Strategy. With the support of the Government of Canada and Province of British Columbia, it began implementing that Strategy in 2006. The Strategy focused on strengthening and growing the Aboriginal cultural tourism industry in BC through three thematic tiers of activities that focused on: 1) Building awareness of cultural tourism opportunities; 2) Supporting product development through skills training, partnerships, and market readiness initiatives; and 3) Promoting products through a range of targeted marketing and communications programs (e.g., advertising, events, travel trade and media relations, and branding related to a unique Aboriginal Cultural Tourism Authenticity program). This report provides insights into Aboriginal tourism's performance between 2006 and 2010, and describes those Strategy activities that have been especially influential in supporting the sector's development during that period. It also forecasts prospects for Aboriginal tourism growth to 2012. These forecasts are based on anticipated trends in tourist flows to BC, tour operator views on Aboriginal tourism prospects, and Aboriginal tourism operator perspectives on development opportunities.

When reviewing Aboriginal tourism's performance, it is important to recognize that at the time the Blueprint Strategy was being prepared, BC's tourism industry was thriving and the anticipated outcomes of the Strategy's implementation were particularly optimistic. However, early in the Strategy's implementation, a global recession placed many national economies in jeopardy, and dampened tourism demand around the world. Consequently, tourism flows and associated revenues for governments and businesses dropped in most regions. The recession and its related spillover effects challenged tourism performance and prospects for Canada, BC, and Aboriginal tourism development.

Despite these challenges, British Columbia fared better than most of Canada during the economic slowdown. The impact of the recession was softened by construction, service and consumer expenditures related to the 2010 Winter Olympic and Paralympic Games. BC's tourism industry performance stayed minimally positive during the three year period leading to the Games while the rest of Canada's overall overnight tourist visitors declined. From 2009 to 2010, BC's estimated overnight volume increased 2.4%, and is currently forecasted to grow by another 2.5% in 2011 (BC MTCA, 2011). Forecasts for tourism growth from 2011 to 2012 are more speculative but are forecasted to be in the 3% range (Conference Board of Canada, 2009). As with other sectors of tourism, prospects for Aboriginal tourism growth are influenced by these overriding trends. Notwithstanding this reality, several dimensions of Aboriginal tourism development in BC have been positive over the period 2006 though 2010. Several of AtBC's Blueprint Strategy implementation activities have supported this performance and most significantly are laying the groundwork for future prospects. The following sections highlight particularly important aspects of Aboriginal tourism performance in BC.

Activities, Outreach and Partnerships

- Implementation of the Blueprint strategy has involved partnerships, presentations, workshops and training sessions, and public and media relations activities. Many of the activities leading up to and including those in 2009/10 were driven by capitalizing on the 2010 Winter Olympics. Activities at the beginning focused on building awareness amongst First Nations, the Aboriginal community, and in the travel trade and tourism industry, while tools were prepared for industry development.
- AtBC focuses its outreach activities – presentations, participation in committees, attendance at events – at least half on keeping in contact with the Aboriginal community to build awareness, interest, participation and skills, and then in increasing partnerships with the industry.
- Recognizing that the largest volume of tourists to BC visits the Vancouver Coast & Mountains region, and that most provincial and national organizations are located in the Vancouver area, many of AtBC's outreach activities are in this region. In 2007/08 when AtBC was building the Aboriginal tourism industries reputation, 54% of activities were in the Vancouver Coast & Mountains region and 31% focused on provincial-wide initiatives. This began to shift in the following years to 2010/11 levels of 38% Vancouver Coast & Mountains and 50% provincial focused.
- Training activities designed to build the skills of Aboriginal seeking a career in the tourism industry, and others looking to start or improve business operations included development and testing of Cultural Interpretation and Business Development programs, and partnering with other organizations for the delivery of training sessions. From 2008-2010, 15 training sessions were held for 167 participants of which 38% were male and 62% female. Training sessions were delivered in each of the six BC tourism regions.
- Partnerships are viewed as an essential element to the implementation, success and sustainability of Aboriginal tourism in BC. Since 2006, the number of partners with AtBC has steadily increased from 7 to 45 from 2006 to 2010. Partnerships are typically driven by training (35%) with training organizations, First Nations and Aboriginal organizations. Many other partnerships are one-off motivated by special events.
- Since implementation of the Blueprint strategy began, the number of market-ready Aboriginal tourism operators has grown to 68. Two of AtBC's marketing and standards programs require applicants to be market-ready to participate – Marketing Co-op and the Authenticity program. From 2008/09 to 2009/10, the Marketing Co-op program went from 38 to 50 participants, representing and increase of 32%. The Authenticity program was introduced in 2009 with five businesses qualifying in the pilot year.
- Marketing initiatives have primarily targeted BC audiences and distribution points, with Tourism BC and Canada Tourism Commission also assisting with distributing collateral materials for AtBC. The primarily printed material is 100,000 copies of the *Culture and Adventures Guide* which was increased for the 2010 Winter Olympics to 160,000. A special *Passport to Aboriginal Cultural Tourism* lure publication was also printed for the Olympics. Both these publications were distributed widely throughout BC, and to targeted international destination including the USA, Germany and Australia.
- AtBC's attendance at industry events – Canada's West Marketplace and Rendez-vous Canada, and the BC Outdoor Show – gives AtBC an opportunity to interact directly with the travel trade to tell them of the product and get first-hand feedback on interests, needs and challenges with including Aboriginal tourism in their packages. AtBC distributes about 5,500 copies at these events.
- Typically AtBC contributes or assists with including Aboriginal tourism experiences in fam tours coordinated by other organizations. In 2008/09, AtBC began directly coordinating tours which since has

resulted in 11 fam tours. Most of these are with media writers, which have generated 78 printed stories and 54 electronic stories from visits to 61 Aboriginal tourism sites.

Markets, Volume and Revenue

- According to Global Tourism Watch (2009), tourist interest in various aspects of Aboriginal culture is both strong and stable in most of Canada's key international markets, interest is highest (~86%) amongst potential Chinese travelers and lowest (~42%) amongst Americans. Notably, conversion of this market interest into actual 'incidences' of participation (i.e., % of travelers experiencing Aboriginal tourism attractions / products / services, etc.) is reported to be greater in BC than elsewhere in Canada for all but Japanese visitors.
- During the period 2006 to 2010, the overall incidence of travelers in BC experiencing Aboriginal tourism attractions / products / services increased from about 13% to an estimated 22%. Given the unprecedented media exposure generated about Aboriginal cultures in BC during the 2010 Winter Olympic Games, and the accelerated levels of Aboriginal tourism marketing undertaken by AtBC and its partners during the ramp up to the Games, it is likely that current incidence levels will remain as high if not higher than those estimated for 2010.
- Based on the overall BC overnight visitor flows (BC MTCA, 2011) and Aboriginal tourism incidence levels (TBC 2009), an estimated 3.7 million tourists experienced some form of Aboriginal tourism (e.g., attractions, products, services, events, etc.) as part of their provincial trips in 2010. This represents an almost doubling (~97%) of estimated 2006 visit levels.
- Estimated Aboriginal tourism expenditures in BC reached about $40 million in the 2010 Olympic year. This represents a 6% increase over estimated 2009 levels, and a doubling (100%) over 2006 levels.
- By 2012, overnight visitors including Aboriginal tourism experiences in their BC trip itineraries is forecasted to be around 3.9 million tourists. It is anticipated that they will collectively spend around $43 million in BC. This represents an increase of about 115% in expenditures over estimated 2006 levels.

Tax Revenue

- Based on overall visitor expenditure estimates, it is estimated that Aboriginal tourists contributed about $11.3 million in tax revenues to various levels of government in 2010. About 51% of this total ($5.1 million) went to the federal government, 40% to the province of BC, and the balance was distributed to local governments. By 2012, such taxes are expected to swell to $12.2 million – about a 13% increase over 2009 levels

Aboriginal Tourism Businesses

- An estimated 221 Aboriginal tourism businesses were identified as operating in BC in 2010. The average age of these businesses was about 10.3 years. About a fifth of them (~23%) starting operations between 2006 and 2010.

Aboriginal Tourism Employment

- During peak season of 2010 Aboriginal tourism businesses employed an average of about 16 people per firm. This translated into about 10.25 full-time equivalent jobs each. Around half of these jobs (~51%) were filled by Aboriginal or Métis people.
- An estimated 2,226 full-time equivalent jobs were collectively generated by these businesses in 2010. This is about 32% more than those reported in 2006.

Aboriginal Tourism Operator Performance Perceptions to 2010

- Despite confronting many challenges, BC's Aboriginal tourism operators generally reported positive growth in their businesses. About 54% felt that their business revenues had increased over the preceding three years, and almost half of them indicated they had strengthened their marketing programs during that period (AtBC Business Survey, 2011).

AtBC's Affect on BC's Aboriginal Tourism Industry

- Almost all (96%) reporting Aboriginal tourism business operators indicated that AtBC had played an influential role in increasing global awareness of Aboriginal tourism in BC, as well as initiating important partnerships with travel trade organizations (e.g., inbound and receptive operators). Almost as large a share of them (86%) indicated that AtBC played a positive supportive role in building the industry's capacity through its tourism and customer service training programs.

BC's Aboriginal tourism industry has fared well despite the weakened economy and challenging tourism operating environment over the period 2006-2010. In many ways it has exceeded the performance of more mainstream tourism operations conducting business over the same time frame. While AtBC's implementation of the Blueprint Strategy commenced slowly in its initial years, in recent times the organization has made significant headway. Its Strategy activities are recognized as contributing to the increased market awareness, business readiness, partnerships, and market growth needed to sustain this fledgling tourism sector for Aboriginal communities, entrepreneurs and the broader economy.

AtBC **Blueprint Strategy**
Tourism Performance Review 2006-2010

1 Introduction

This report describes AtBC's activities related to the implementation of its Aboriginal Blueprint Strategy for the period 2006 to 2010. It then describes changes in the performance of the industry over this same period, as well as some projections for anticipated growth to 2010. The report is based on a review of data provided via reports, survey data, and interviews with government organizations (Stats BC, Ministry of Tourism Culture and the Arts tourism personnel, travel trade operators, Aboriginal tourism business operators, AtBC staff members, as well as other economic organizations providing data tourism industry performance an and prospects). Collectively, the information they supplied formed the foundation for what is presented in this progress report.

Several external forces beyond the direct control of AtBC have affected Aboriginal tourism's growth since the inception of the Blueprint Strategy. Some of them will continue to play significant roles in shaping Aboriginal tourism's prospects, while others will disappear only to be replaced by different influences. However, it is clear that as AtBC and Aboriginal tourism development matures, the industry is becoming increasingly capable of contributing to the tourism economy and the sustainable livelihoods of Aboriginal people in BC.

The AtBC Blueprint Strategy was initially prepared in the early to mid 2000s and released in 2005, which was a time of economic growth, consumer optimism, and overall tourism prosperity. The underlying sentiment at that time was that AtBC's initiatives would capture and 'ride the wave' of positive economic drivers, growing tourism expansions in infrastructure, human capacity and targeted promotions, as well as escalating culturally and environmentally oriented tourism market preferences. In combination, these factors would help 'accelerate' Aboriginal tourism development in BC. The AtBC Blueprint Strategy's initiatives and associated performance milestones reflected the optimism and momentum of the day.

During its initial years of the Blueprint Strategy enactment beginning 2006, AtBC undertook a range of internal structural, capacity building and networking activities to position it for implementing the Blueprint Strategy, as well capitalizing on the existing tourism opportunities. Not the least of these activities involved cementing required partnerships with funding organizations, and key industry and First Nation organizations.

As with most new 'start up' organizations, AtBC experienced organizational, capacity, and programmatic challenges which constrained its ability to gain the level of traction it anticipated in the initial implementation period. These constraints coincided with the gradual emergence and eventual effects of the global and provincial economic downturn. In combination these circumstances dampened AtBC's ability to proceed as quickly towards achieving many of its Blueprint goals. Despite these circumstances, AtBC did move forward in a proactive fashion and laid some of the foundation needed for nurturing a larger and more vibrant Aboriginal tourism industry – one that highlighted the uniqueness and quality of Aboriginal cultural tourism experiences. During this period, it also sharpened many of its short and long-term 'goal posts' to reflect the realities of today's economy, consumer marketplace, and business development environment. The following sections describe AtBC's current tourism landscape and Blueprint activities, and following that are key measures of the organization's performances, as well of the overall tourism industry accomplishments since 2006.

2 The Changing Economic and Tourism Landscape

Regional tourism performance is greatly influenced by a combination of both external and more localized economic and market forces. Most importantly, tourist expenditures are discretionary. During periods of economic expansion, spending on tourism goods and services tends to increase. However, such spending dries up quickly when the economy is not performing well. Expansions in tourism volumes and revenues in the decade immediately preceding the development of AtBC's Aboriginal Cultural Tourism Blueprint Strategy were partly reflective of the relatively robust economic conditions in North America and overseas during that period. This was the case especially in BC where tourists from other parts of Canada and the United States accounted for about 40% of the province's overnight visitor market. The depth and character of the economic recession that emerged in the second year of the Blueprint Strategy's implementation was unanticipated and greatly increased the challenges of building Aboriginal tourism in the short-term. Nonetheless, in its earliest Blueprint strategy years, AtBC began laying the foundation for growth when economic conditions changed for the better.

While it appears that the current economic recession (which pushed several countries and hundreds of thousands of businesses around the globe to the brink of economic catastrophe) has stepped back from the abyss in many places, the climb back to prosperous times is predicted to be long and turbulent. In Canada, expert sentiment claims that while the 'technical recession' is over, its ripple effects (e.g., unemployment, business failure, loan losses, troubled housing markets, diminished business confidence, etc.) continue to linger. Happily the nation has not experienced a much feared 'double dip' recession. However, many signs point to a relatively weak recovery through 2011. This is in part due to Canada's economy being partially propped up by on-going low interest rates and the trickle down effects of earlier massive government spending. Despite the fragility of the recovery, there are promising signs that the tide has turned and Canada is well positioned to strengthen its economic growth over the next couple of years. For instance, Canadian exports and consumer confidence sentiment strengthened considerably over the last six months of 2010. Similarly, the country's stock market climbed throughout most of 2009 and 2010, and house and home renovation purchases spiked during this same period.

In BC the depth of the province's economic retreat was partially softened by construction, service and consumer expenditures related to preparations for and the delivery of the 2010 Winter Olympic and Paralympic Games. While Canada's overall overnight tourism visits spiraled downwards over the previous three years, BC's overall visitor volumes stayed minimally positive during this same period. In fact, the province experienced an estimated increase of 2.4% in overnight stays between 2009 and 2010. Forecasted growth in 2011 is estimated to be in the 2.5% range in 2011 (BC MTCA, 2011). While forecasting increases beyond 2011 are challenging, the Conference Board of Canada suggested that BC will have a 3% increase in overnight stays in 2012 (Conference Board of Canada, 2009). Accompanying these anticipated escalations is visitor traffic increases in overall tourism revenues. For instance, in 2010 the combined influence of the 'Olympic effect' and an emerging recovery helped generate an estimated $8 billion in tourism revenues in BC. This was an estimated 3.8% higher than in 2009. Similarly, the province forecasts that these revenues will increase by about 4.6% in 2011. Longer term estimates by the Conference Board of Canada (2009) claim that revenues will grow by 5.5% over 2011 levels in 2012.

Notwithstanding these projected modest increases, there still remains much uncertainty concerning how the industry in general will perform. So much depends on how rapidly and robustly the anticipated economic recovery unfolds, how Canada's currency value shifts in comparison to US and other foreign funds, and how fuel and commodity prices change over the next two years. Adding to this uncertainty is the potential impact of the recently implemented Province of British Columbia Harmonized Sales Tax (HST) which is expected to increase tourism prices by about 4.66% on average (COTA 2009). Shifts in these and other 'world events' have the potential to dramatically change BC's overall competitiveness as a tourism destination (COTA Oct, 2009), and in turn affect Aboriginal tourism's prospects.

3 Aboriginal Tourism Association of BC (AtBC)

Established in 1996 as a non-profit, stakeholder-based organization, AtBC is committed to growing and promoting a sustainable, culturally rich Aboriginal tourism industry in British Columbia. It supports the development of the Aboriginal tourism product in the province, and represents 128 Aboriginal tourism provider members including resorts, museums and other attractions, hotels, outdoor adventure, arts and crafts, entertainers, transportation and culinary experiences. AtBC has become a leading organization worldwide on Indigenous tourism, implementing the $10 million Aboriginal Cultural Tourism Blueprint Strategy which has been hailed as the model for developing and expanding Indigenous tourism worldwide, and as well, is the longest operating Aboriginal tourism association in Canada.

Through training, information resources, networking opportunities and co-operative marketing programs, AtBC is a one-stop resource for Aboriginal entrepreneurs and communities in BC who are operating or looking to start a tourism business. AtBC works closely with tourism, business, education and government organizations to help BC's Aboriginal tourism businesses offer quality experiences and actively promotes these experiences to visitors and local residents.

AtBC Vision
… is of a prosperous and respectful Aboriginal cultural tourism industry sharing authentic products that exceed visitor expectations.

AtBC Mission
… is to provide training, awareness, product development and marketing to support a sustainable authentic Aboriginal cultural tourism industry in British Columbia while contributing to cultural preservation and economic development.

AtBC has successfully developed and implemented many initiatives, tools, training programs and workshops designed for First Nations and Aboriginal businesses and people to participate in the tourism industry. These programs relate to the three tiers of the Aboriginal Cultural Tourism Blueprint Strategy: 1) Awareness, 2) Product Development / Capacity Building, and 3) Marketing. There are also activities that build the connection with and understanding of other stakeholders being the travel trade, tourism organizations, governments, including visitors, and other tourism operators. The Tier activities and results within the Tiers are described below.

3.1 TIER 1 – AWARENESS

Tier 1 is all about building the awareness of tourism benefits and opportunities starting with First Nations for community economic, social and cultural development, and Aboriginal people who are seeking career and business opportunities. It also is about increasing the understanding to the travel trade, operators and industry organizations of what Aboriginal tourism is and the ventures and benefits to the mainstream tourism industry.

3.1.1 Outreach Activities

Reaching out to build awareness of Aboriginal tourism to the general public, AtBC has directed some of its advertising, and media and public relations activities to fulfill this goal. Billboard advertising displaying drawings of west coast Aboriginal art and culture were erected for the summer of 2009, and since the same year, AtBC has participated annually in the *Vancouver's Canada Day Parade* which draws an audience of roughly 85,000 people. In 2009, AtBC organized the *Indian Summer Festival* at Vancouver's Robson Square. This three-day celebration of BC's First Nations and Métis culture, entertainment, food, and arts began with a media and industry launch, and had 20 AtBC members participating.

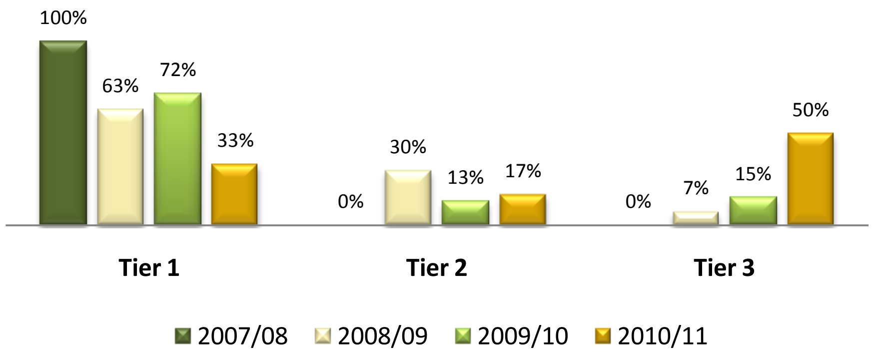
The grandest event was AtBC's *Vancouver 2010 Winter Olympics* campaign which spanned this 17-day event and started with the Klahowya Village opening media reception at the Vancouver Pan Pacific Hotel that included exhibits, performances and partnering throughout the Olympic zone.

Following the Olympics, AtBC capitalized on the "afterglow" by partnering with *Tourism Vancouver* to setup an Aboriginal kiosk in the Tourism Vancouver Visitor Centre (at 200 Burrard Street near the Vancouver Convention Centre), and then erected Klahowya Village at Stanley Park in partnership with the City of Vancouver and the Vancouver Parks Board. Klahowya Village first honors the Squamish, Tsleil-Waututh, and Musqueam First Nations whose traditional lands the village is on, and also celebrates the cultures of First Nations in BC. These two sites both contribute to promoting the awareness of Aboriginal cultures and tourism in BC, and are spring boards to visitors to encourage them to travel beyond BC's tourism gateway cities of Vancouver, Victoria and Whistler.

In 2007, all outreach activities were on building awareness. This was an important period as it was when AtBC was establishing its organization structure and developing its Trailblazer programs and awareness of the Blueprint strategy and the tools and resources being produced were important. With the passing of each year, outreach activities shifted into *Tier 2: Development* and *Tier 3: Marketing* activities (**Figure 1**) with AtBC being more involved in industry planning and events as a committee member, partner and / or presenter, and hosting public events, as well as participating in other events. Involvement in the Vancouver Easter Parade and Santa Claus Parade increases the awareness of Aboriginal tourism and First Nations and Métis cultures to Vancouver and other BC residents, who are the largest tourist market for BC tourism, plus are influencers in activities and places to travel when their friends and relatives come to BC to visit.

Tier 2: Development outreach activities are primarily presentations and attendance at regional and community forums, and to tourism classes. They also include participation in industry strategic planning and sector development which are most often done by the AtBC CEO. In 2008/09 these activities were at their highest at 29.6% and then began declining to 26.7% in 2010/11, while *Tier 3: Marketing* activities increased during this same period from 7.4% to 50% of the activities. This is a natural transition as the notoriety of Aboriginal tourism in BC increased and the operations and reputation of BC's Aboriginal tourism product and AtBC stabilized.

Figure 1 – Outreach Activities by Tier 2007-2011



Nearly half of outreach activities are directed at the Aboriginal community being Aboriginal people, operators and First Nations political and other organizations. Interaction with the Industry / Travel Trade accounts for 21% of tasks, while Education and Training organizations interaction is low at 3% (**Figure 2**). The low rate of the participation with Education and Training is primarily attributed to the structure of the Aboriginal employment and training system which is managed primarily by the Aboriginal community with Educators and Trainers are suppliers. AtBC's relation with the industry has been stable over the period being roughly one-third of activities. General public interaction increased in 2010/11 though, due mostly to the 2010 Winter Olympics and activities associated with pre- and post- Games (**Table 1**).

Figure 2 – Outreach Activities by Target Market 2007-2011

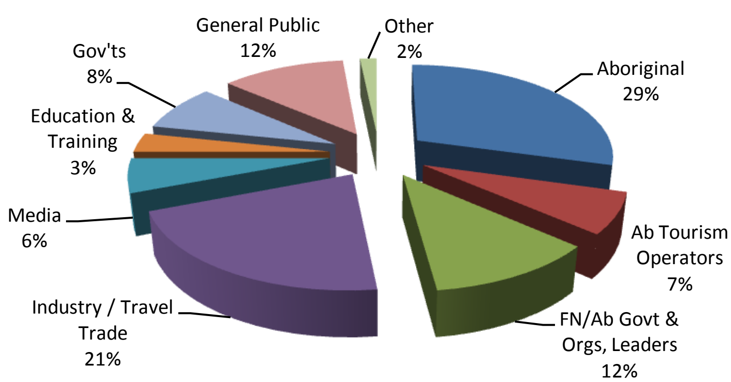
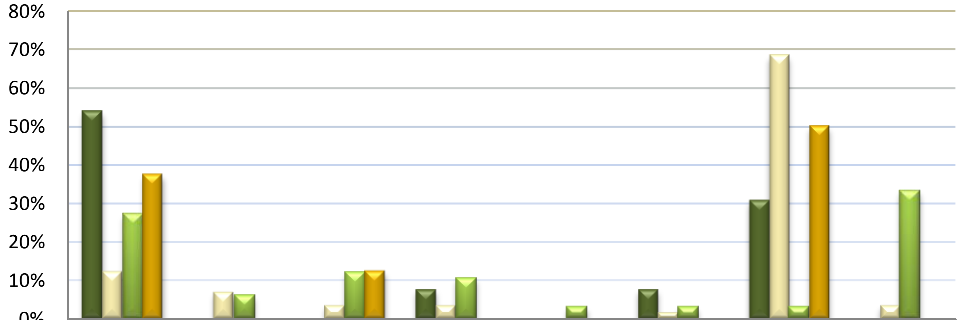


Table 1 – Outreach Activities by Target Market 2007-2011

Audience Type	Avg	2007/08	2008/09	2009/10	2010/11
Aboriginal	**32%**	41%	34%	32%	20%
Ab Tourism Operators	**8%**	--	9%	4%	10%
FN/Ab Govt & Orgs, Leaders	**13%**	12%	11%	17%	10%
Industry / Travel Trade	**23%**	18%	20%	23%	30%
Media	**6%**	6%	7%	6%	--
Education & Training	**4%**	--	2%	5%	--
Governments	**9%**	--	11%	5%	10%
General Public	**13%**	24%	2%	6%	20%
Other	**2%**	--	2%	1%	--
Total FN/Aboriginal %	**52%**	53%	55%	53%	40%

While outreach activities and interaction with various stakeholder groups appears to be making a natural transition to increasing *Tier 2: Development* and Tier 3: Marketing activities which contribute to the growth of the industry and sustainability of Aboriginal tourism operators, AtBC's involvement in all tourism regions of the province is skewed with heavy emphasis on the Vancouver Coast and Mountains region (**Figure 3**).

Figure 3 – Outreach Activities by Tourism Region 2007-2011



	Vancouver Coast & Mountains	Vancouver Island	Thompson Okanagan	Northern BC	Kootenay Rockies	Cariboo Chilcotin Coast	BC / Provincial Scope	Other
2007/08	54%	0%	0%	8%	0%	8%	31%	0%
2008/09	12%	7%	4%	4%	0%	2%	68%	4%
2009/10	27%	6%	12%	11%	3%	3%	3%	33%
2010/11	38%	0%	13%	0%	0%	0%	50%	0%

3.2 TIER 2 – PRODUCT DEVELOPMENT / CAPACITY BUILDING

3.2.1 Aboriginal Training Programs

AtBC has developed new tourism training programs and tools, and partnered with organizations that have industry proven and recognized programs, organizations like Ministry of Tourism (formerly Tourism BC), the Native Education College, and Go2. Designed to increase the awareness, participation and success in the tourism industry of First Nations and Aboriginal people as tourism operators and workers, the programs fulfill the developmental needs of three areas: 1) Awareness for tourism planning, 2) Business development series, and 3) tourism and cultural hospitality skills. These programs are marketed primarily under the "Trailblazer" brand, and two have two components – Train-the-trainer and participant.

- **Train-the-trainer programs – Cultural Interpretation and Business Development** – provides participants who successfully pass the course to be the designated trainer in their region and for the trainers to earn extra income; while for regional organizations they benefit by having a local trainer who is familiar with the region, the First Nations and the tourism opportunities, but more so as trainers are local, training costs are more affordable as travel is low or no cost. There are 16 people trained to deliver the Trailblazers – Aboriginal Tourism Business Development Participant Training.
- **Aboriginal Tourism Trailblazers Cultural Interpretation program – Participants** – offers entry-level tourism skills training and builds career awareness for those launching a tourism career. Through

practical hands-on experience and classroom sessions, training includes courses on heritage interpretation to help people share their own unique stories, cultural practices, as well as inter-cultural workshops. Participants acquire industry-recognized certification to help expand their career options, including three credit courses in Special Events Management, WorldHost and FirstHost customer service, First Aid Level 1, Transportation Endorsement, and FoodSafe. Graduates of the Train-the-Trainer program also receive the Tourism Visitor Centre counselor certification. A Cultural Interpretation – Train-the-Trainer program is also offered which is designed to accredit Aboriginal individuals to deliver the Trailblazers Cultural Interpretation program at the community level.

- **Aboriginal Tourism Business Development program – Participants** – launched in January 2009, this program provides skills training so community representatives and individuals can capitalize on the entrepreneurial spirit to identify tourism business opportunities. Participants carry out market research, write a business plan, explore financing options, and learn about the tools necessary to make tourism a viable business option. The train-the-trainer program is offered for this program.
- **FirstHost** – is a one-day front-line worker's hospitality training program. Since the mid-90s, this accredited industry recognized program owned by the Native Education College offers participants skills development in interacting with customers, problem-solving and knowledge of BC's First Nations cultures. It also has a train-the-trainers component. AtBC has a partnership with the NEC to promote and deliver the program.

Three Train-the-Trainer sessions resulted in 32 people trained to deliver the Cultural Interpretation program (two sessions resulting in 26 trainers) and the Business Development program (one session resulting in 16 trainers) (**Table 2**). In July and September 2008, AtBC tested reducing the program duration of these two programs from 6-weeks to 2-weeks to increase the accessibility of the programs; these pilot sessions were offered in the Central Coast and in Northeastern BC.

Table 2 – AtBC Capacity Building Program Performance 2008-2010

Trailblazer Program	# of Sessions	# of Participants	Male	Female
Cultural Interpretation - Train-the-trainer	2	26	8	18
Cultural Interpretation - Participants	7	76	30	46
Business Development - Train-the-trainer	1	16	6	10
Business Development - Participant	1	16	5	11
FirstHost	1	5	4	1
Trailblazers - Train-the-trainer	1	16	6	10
Pilot training sessions	2	12	5	7
OVERALL / TOTAL	**15**	**167**	**64**	**103**
Percentage			**38%**	**62%**

These 15 sessions provided training to 167 participants of which 38% were male and 62% female (**Table 2**), and roughly half were youth under 30 years old. Total training days of all these sessions were 319 days, which equated to 3,693 total training days for all participants. The trainees represented 32 First Nations including Métis, almost all being from First Nations within BC, and mostly from the Secwepemc and Squamish Nations.

The number of participants in the training programs has increased since 2007/08 when AtBC trained its first group of 16 trainers to 65 program participants in 2009/10 and repeating the number of participants in 2010/11 (**Table**

3). The number of trainees per fiscal year is a reflection to the duration of the training sessions. Most of the sessions have been 6-week programs, even though in 2008/09 AtBC pilot two sessions which reduced the Cultural Interpretation Training program from 6-weeks to 2-weeks. FirstHost is the only program during from 2006-2010/11 that is shorter than the multiple week programs; FirstHost is a one-day program and was only offered in 2009/10 through AtBC in partnership with the RICE program in Kootenay.

Table 3 – Aboriginal Participation in AtBC Training Programs 2006-2011

Trailblazer Program	2006/07	2007/08	2008/09	2009/10	2010/11
Cultural Interpretation - Train-the-trainer	---	---	---	16	10
Cultural Interpretation - Participants	---	---	23	28	35
Business Development - Train-the-trainer	---	---	16	---	---
Business Development - Participant	---	---	---	16	20
FirstHost	---	---	---	5	---
Trailblazers - Train-the-trainer	---	16	---	---	---
Pilot training sessions	---	---	12	---	---
TOTAL	**0**	**16**	**51**	**65**	**65**
% Change	---	**100%**	**219%**	**27%**	**0%**

AtBC's four Trailblazer training programs helped address the industry's need for more trained and competent employees and a market need for quality Aboriginal tourism experiences. Developed by AtBC and only in their early stages of delivery, the programs offered a range of train-the-trainer short courses for program trainers and their participants. From 2008 to 2010, there were 15 sessions delivered with 53% being offered in the Vancouver Coast and Mountains region (**Table 4**) primarily due to the type of training (train-the-trainer) and in preparation for the 2010 Winter Olympics.

Table 4 – AtBC Capacity Training Programs by Tourism Region 2008-2010

Tourism Region	# Sessions	%
Vancouver Coast and Mountains	8	53.3%
Vancouver Island	1	6.7%
Thompson Okanagan	1	6.7%
Kootenay Rockies	1	6.7%
Northern BC	2	13.3%
Cariboo Chilcotin	2	13.3%
TOTAL	**15**	**100%***

**May not total 100% due to rounding*

In 2010, a couple special training initiatives were offered to capitalize on the Olympics opportunities. These were:

» **Olympic Events** – As part of its Olympics initiatives, AtBC promoted Aboriginal Cultural tourism experiences at a variety of hosting venues. These included the Klahowya Village venue at the Pan Pacific Hotel, the Robson Square Signature Celebration site, the Four Host First Nations Pavilion, and the Aboriginal Artisan Village at Vancouver Community College. As an integral part of these activities, 28 Aboriginal and /or Métis people were engaged as hosts to share their cultural stories with visitors (media, spectators, Olympic family etc.) to these sites. Overall, 15 of these hosts were Trailblazer Cultural Interpretation trainees and 13 were certified Trailblazer trainers.

- **Klahowya Village** – As part of its 2010 Klahowya Village project, AtBC used the attraction as a platform for training Aboriginal people for employment in tourism. During the attraction's 74-day operating season, 42 trainees participated in various Trailblazer programs sponsored by AtBC and its partners. After completing their programs, nine of the graduated trainees went back to school for more academic training, and 12 entered the workforce as either full or part time employee. In addition, after the Klahowya season was completed, AtBC helped the BC Government BladeRunners program (managed by the Aboriginal Community Career Employment Services Society (ACCESS)) to train 30 at-risk Aboriginal youth in the hospitality industry.

3.2.2 Aboriginal Tourism Participation in Training Programs

There are clear signs that AtBC's training programs are gaining traction with individual Aboriginal people, but also Aboriginal tourism businesses. While still in an emerging phase, those training programs cited most frequently as being used by businesses in the past address themes related to marketing and services management (56%), as well as cultural authenticity planning (22%) (AtBC Business Survey 2011) (**Table 5**). More importantly, all most all of AtBC's capacity building programs are mentioned by at least half the businesses for future use. Leading this list are training programs associated with cultural authentic planning (74%) and tourism business planning (62%) (**Table 5**).

Table 5 – Past and Future Use of AtBC Capacity Building Programs

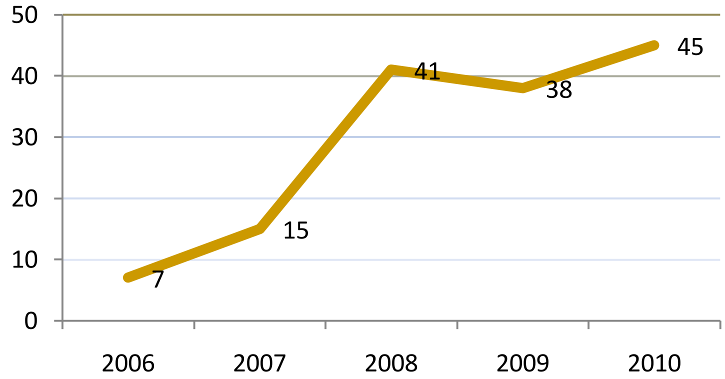
Training Type	% Used In the Past	% Use In Future
Aboriginal Cultural Authenticity Program	22%	74%
Tourism Business Planning Training	15%	62%
Marketing Programs / Services	55%	52%
Cultural Interpretation / Hospitality Training	14%	43%
Cultural Interpretation – Train-the-Trainer	7%	50%

3.2.3 Partnerships and Other Industry Relations

The Aboriginal Tourism Blue Print Strategy clearly identified partnership development as a critical factor influencing Aboriginal Tourism's future possibilities for success. Partnerships were seen as a vehicle for fast-tracking the industry's development of tourism skills, products, services, finances and social relationships needed to compete in both domestic and international markets. AtBC pursued such partnerships on a variety of fronts over the past two years. Most of its capacity building efforts related to partnering were integrated into a broader set of Olympic projects promoting Aboriginal tourism to media and consumer groups before, during and after the 2010 Winter Olympic Games.

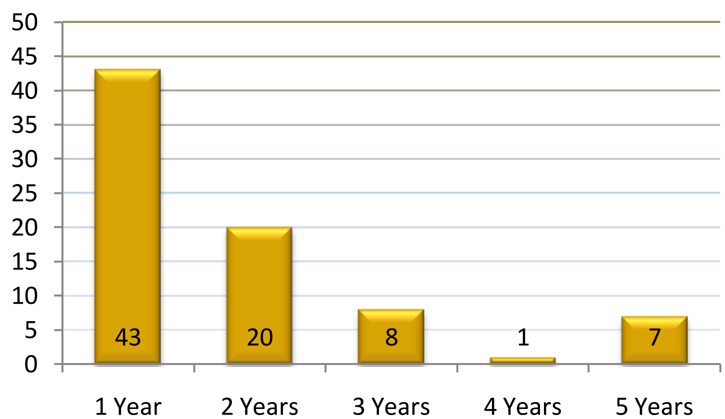
From the beginning of implementation of the Blueprint Strategy, outreach activities have escalated which began with the required annual reporting and meeting to now include presentations, participation in committees, contributing to research projects and strategic planning, attending career days, organizing stakeholder events, increasing media and public relations activities, and distributing a monthly CEO prepared "E-news Update" to all stakeholders and AtBC friends. In 2006, the number of partnerships was 7 then escalated to 45 in 2010 (**Figure 4**).

Figure 4 – Number of Partners 2006-2010



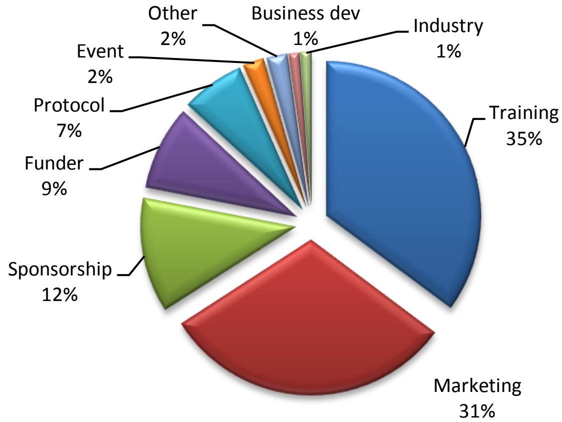
The average term of a partnership has been 1.8 years, and those that have endured five years are relationships primarily with funding organizations and provincial organizations that have a mandate for tourism and hospitality training and *Coast Hotels and Resorts* which has been the longest standing corporate member and partner with AtBC since its inception (**Figure 5**). Half of the partnerships are short-lived being one year in duration, often these are related to a specific event or training initiative, while other partnerships that endure multiple years are driven by political protocols with First Nations and First Nations political organizations and private sector sponsorships (**Figure 5**). AtBC has enjoyed ongoing sponsorships with private sector organizations like RBC Royal Bank of Canada, BC Ferries Corporation, and training organizations like *Capilano College*, *First Nations Employment Society* and *Native Education College*. This signifies the period 2007-2008 when AtBC began delivering training programs.

Figure 5 – Duration of AtBC Partnerships 2006-2010



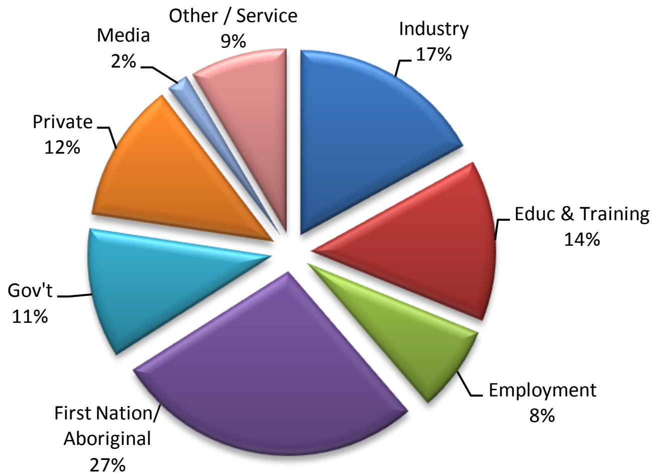
The nature of partnerships that AtBC engages is largely for training purposes representing 35% of its partnerships, and then driven by marketing initiatives which represents 30% of partnerships. While funders tend to have the longest relationships with AtBC, they represent only 9% of the partners (**Figure 6**), and together with sponsors represent roughly one-fifth of partners.

Figure 6 – Nature of Partnership 2006-2010



While the reason for the partnership is driven by an activity, the partners AtBC engages varies from government to industry including training and marketing organizations, sponsors, and of course First Nations. First Nations are typically both partnered with for protocol and training purposes, which represents 27% of partners (**Figure 7**).

Figure 7 – AtBC Partner Types



A challenge that AtBC faces is establishing partnerships in every tourism region of the province. While 33 of the 81 partners (41%) since 2008 are provincial in nature; however, when only the tourism regions are considered, 65% of AtBC partnerships are focused on tourism initiatives in the Vancouver Coast and Mountains tourism region (**Table 6**). The nature of the large number of Vancouver Coast and Mountain partnerships has to be examined to determine the logic. Certainly the large number of Vancouver Coast and Mountain partnerships have been motivated greatly by the 2010 Winter Olympics and the concentration of tourism organizations, tourism businesses, media and public relations activities in the region, and most important are an acknowledgement of the importance of this region as the ‘gateway’ to other BC tourism regions.

Table 6 – Partners by Tourism Region from 2008-2010

Region	#	%
Vancouver Coast and Mountains	31	65%
Vancouver Island	5	10%
Thompson Okanagan	3	6%
Northern BC	5	10%
Kootenay Rockies	1	2%
Cariboo Chilcotin Coast	3	6%
BC-wide	33	41%
Total Partners	**81**	

Along with its partners and stakeholders, it developed and delivered seven strategic Olympic programs that fostered a range of capacity building and promotional benefits. For instance, as part of its post Games programming, it developed and managed a 74 day attraction called Klahowya Village. In this initiative AtBC partnered with 21 organizations that supplied a range of direct and in-kind resources (financial, human, technical, infrastructural, marketing, advisory, management, etc.) that helped the organization and its many stakeholders develop and successfully launch this new attraction (**Table 7**). Comprised of both corporate and government partners, the project generated about $437,000 in contributions for the attraction, as well as countless amounts of in-kind support.

All seven Olympic projects in combination involved alliance building with 21 different corporate and nine different government (Aboriginal and / or Non-Aboriginal) organizations. Some of these partners participated in multiple AtBC projects (**Table 7**). Collectively these partnerships contributed over $1.2 million to AtBC's programs, in addition to a wide range of in-kind capacity building activities for AtBC stakeholders. Most importantly, the alliances provide the initial foundation for future potential collaborations which help accelerate the development of Aboriginal tourism in BC (**Table 7**).

Table 7 – AtBC Special and New Projects Partners

Project / Event	# Non Aboriginal Corporate Partners*	*Government Partners (Aboriginal and Non-Aboriginal)**	Estimated $ Contributions
Pre Games Projects (2009)			
Indian Summer Festival (2009)	7	2	158,600
Games Time Projects (2010)			
2010 Klahowya Village (Pan Pacific)	2	2	375,400
2010 Robson Square Signature Celebrations		1	75,000
2010 Aboriginal Pavilion	1	4	150,000
2010 BC /Canada Pavilion		1	13,000
2010 Aboriginal Artisan Village and Business Showcase	1	4	10,000
Post-Games Projects (2010)			
Klahowya Village	14	7	436,500
Overall Total	**25**	**21**	**1,218,500**

3.2.4 Lists of Partnering Organizations

The organizations that AtBC has partnered with since 2006 are listed below.

First Nations / Aboriginal Organizations	Aboriginal Financial Officer Association of BC, Aboriginal Tourism Marketing Circle, ACCESS, AHRDAs, Assembly of FN BC (AFN BC), Central Interior FN Community Futures (CFDC), First Nation Employment Centre Society, FN Summit / Leadership Council, Four Host First Nations, Haida Gwaii, Industry Council for Aboriginal Business, Lytton First Nation, Métis Nation BC, Musqueam First Nation, New Pathways to Gold (NPWtG), New Relationship Trust, Nuu-chah-nulth, Nuxalk, PGNATEA Prince George Native Advancing Training Employment Association, Squamish / Lil'wat Cultural Centre, Squamish First Nation, Stitsma Employment Services (Squamish), Sto:lo Employment, Sts'ailes Development Corporation, Tsleil-Waututh First Nation, Union of BC Indian Chiefs (UBCIC), VanAsep Training Society, Vancouver Board of Trade, West Moberly
Education and Training	Go2, Link BC, Native Education College, Northwest Community College (NWCC), Royal Roads University, Vancouver Island University (VIU), Colleges, Universities and Post Secondary
Government	Aboriginal Business Canada, BC Advanced Education Labour Market Dev ALMD, BC Lotteries Corp., BC Ministry of Aboriginal Relations, BC Ministry of Tourism, BladeRunners / BC Government, Canadian Heritage, Indian and Northern Affairs Canada INAC, Parks Canada, Tourism BC, Vancouver Parks Board, Western Economic Diversification (WED)
Industry and Private Sector	BC Ferries, BC Partnership for Sustainable Tourism, BC Transmissions Corp., Butchart Gardens, Canada Tourism Commission (CTC) , Council of Tourism Assn (COTA) , Old Spaghetti Co., Vancouver, Other DMOs, Pan Pacific Hotels, Rendevous Canada, The Fish House, Vancouver, Tourism Vancouver, Vancouver 2010 VANOC, Vancouver Airport, Vancouver Coast & Mountains, Vancouver Trolley Company, CESO, CIBC, Royal Bank of Canada, Coast Hotels & Resorts, Fraser Basin Council, RBC Royal Bank of Canada, RISE, Terasen Gas, Thompson Hotel, VanCity, VANOC, West Coast Sightseeing
Media	BC Magazines, Vancouver Sun, Province Newspaper

3.3 TIER 3 – MARKETING

In line with AtBC's vision and mission statements, AtBC's marketing initiatives are designed to promote the BC Aboriginal tourism industry and the market-ready operators to build a sustainable industry that "meet and exceed expectations". At the onset of the Blueprint strategy implementation, marketing messages were general and designed to create an interest and base understanding of Aboriginal tourism and First Nations and Métis cultures. Meanwhile, the BC tourism industry market-ready criteria was communicated to BC Aboriginal tourism operators and encouraged to self-determine if they satisfied the requirements. A marketing strategy was developed and mentoring services offered to build the capacity of AtBC to self-conduct marketing and promotional activities. AtBC also developed a marketing program for its members to buy into, which also enticed others to become AtBC members. The marketing strategy involved the production of collateral materials, placement of advertising, development of the website, involvement in fam (familiarization) tours, and attendance at industry events like tourism trade and consumer shows.

AtBC's tourism development successes to date can be attributed to a combination of factors. These include:

- a growing market preference for products and services that align with Aboriginal tourism experience features;
- a growing physical and human capacity to offer travelers access to a growing range of market ready Aboriginal attractions and services;
- a growing awareness of Aboriginal tourism experiences generated by promotions linked to mainstream tourism and general digital and broadcast media in conjunction with the 2010 Olympic Games; and
- each has played contributive roles in building demand and providing opportunities for Aboriginal tourism in BC.

The marketing and communications activities invigorate the awareness and interest of First Nations, Aboriginal people, Aboriginal tourism operators, the BC tourism industry including travel trade, and of course the visitor. Activities in advertising, media relations and outreach at trade and consumer events have produced media stories, inquiries and partnerships.

3.3.1 Marketing Programs for Aboriginal Tourism Operator Programs

From 2006 to 2010, AtBC's marketing programs for Aboriginal tourism operators transitioned from a general marketing program where operators could buy-in regardless of their operating and ownership standards, to having qualifying criteria influenced by the AtBC membership program which transitioned to a stakeholder model. The Aboriginal tourism operator marketing program is dedicated to raising awareness of the diversity of Aboriginal tourism experiences available in BC. Marketing and communications are directed to consumers, travel trade and travel media to encourage partnerships in tour packaging, and generate publicity for the Aboriginal tourism industry and its operators, and most important, to drive visitors directly to Aboriginal tourism businesses. Benefits for participating in a marketing program typically include promotion:

- on AtBC's consumer and travel trade website;
- in print brochures;
- at travel trade shows and other industry marketing events;
- as part of media relations activities; and
- at special events.

In 2008/09, AtBC changed its marketing program to a co-op program for market-ready operators. In that year, 38 operators participated in the program, and in 2009/10 this increased by 32% to 50, which represented about 72% of the estimated 2009/10 market-ready AtBC stakeholder/Aboriginal tourism operators which was an increases over the previous year which was 63% of the estimated market-ready Aboriginal tourism operators (**Table 8**).

Table 8 – AtBC Marketing Co-Op Program 2007-2010

	2007/08	2008/09	2009/10
Est. Non-Market Ready Operators		55	
Market Ready Operators		60	68
# change over previous year	**0**	**60**	**8**
% change over previous year	**n/a**	**100%**	**13%**
Participating Market-Ready Operators		38	50
# change over previous year	**0**	**38**	**12**
% change over previous year	n/a	100%	32%
% Market Ready Participating in AtBC Marketing Co-op Program		**63%**	**74%**

The Authenticity program is tied closely to the Marketing Co-op program. In order to apply to the Authenticity program, the operator must be participating in the AtBC Marketing Co-op program, must be deemed an Aboriginal tourism business and it must be market-ready. Satisfying these three criteria then enables the Aboriginal business to apply for no additional fee to the Authenticity program which affords the approved operator additional marketing benefits including licensed use of the Authenticity mark. Application to the first year of the Authenticity program was by invitation only as it was the pilot year; in 2009/10 five operators were approved which accounted for 7% of the market-ready Aboriginal operators (**Table 9**).

Table 9 – AtBC Authenticity Program 2008-2010

	2008/09	2009/10
New	---	5
Renewed	---	---
TOTAL		**5**
# change over previous year	0	5
% change over previous year	**n/a**	**100%**
% Market Ready Participating in Authenticity Program	**---**	**7%**

3.3.2 Collateral / Print Materials

Since 2006, the primary collateral piece produced by AtBC is the Culture and Adventures Guide. Distributed throughout British Columbia through the BC tourism industry regional visitor centres, at trade and special events attended by AtBC, and at other events attended by and through contacts of Tourism British Columbia (now the BC Ministry of Tourism) and Canada Tourism Commission, AtBC prints 100,000 copies annually in 2006/07 which increased to 160,000 copies in 2009/10. As AtBC's reputation grew, it began increasing production and distribution of these copies outside of British Columbia reducing the percentage distributed in BC to 44%, with BC Tourism increasing its Canada and international distributions from 11,500 copies to 15,000, and Canada Tourism Commission more than doubling from 4,500 copies in 2006/07 to 9,500 copies in 2009/10. Certainly the 2010 Winter Olympics was the catalyst for increasing the production of the guide, and is reflected by 55,500 copies being distributed at the *2010 Olympic Games Times* consumer event (**Table 10**). The number of direct consumer requests through websites has also increased over the period by 150% from 1000 to 2500 copies.

Table 10 – AtBC Culture and Adventures Guide Distribution 2006-2010

	2006/07	%	2007/08	%	2008/09	%	2009/10	%
TARGET / QTY PRINTED	100,000		100,000		100,000		160,000	
BRITISH COLUMBIA	**77,000**	**77.0%**	**4,000**	**74.0%**	**68,000**	**68.0%**	**70,000**	**43.8%**
Vancouver Coast & Mountains	22,000	**30.0%**	22,000	**22.0%**	20,000	**20.0%**	22,000	**13.8%**
Vancouver Island	15,000	**15.0%**	12,000	**12.0%**	12,000	**12.0%**	12,000	**7.5%**
Thompson Okanagan	10,000	**10.0%**	10,000	**10.0%**	10,000	**10.0%**	10,000	**6.3%**
Northern BC	10,000	**10.0%**	10,000	**10.0%**	8,000	**8.0%**	8,000	**5.0%**
Kootenay Rockies	10,000	**10.0%**	10,000	**10.0%**	8,000	**8.0%**	8,000	**5.0%**
Cariboo Chilcotin	10,000	**10.0%**	10,000	**10.0%**	10,000	**10.0%**	10,000	**6.3%**
Distributed by BC TOURISM	**11,500**	**11.5%**	**11,500**	**11.5%**	**15,000**	**15.0%**	**15,000**	**9.4%**
Alberta	2,500	**2.5%**	2,500	**2.5%**	3,000	**3.0%**	3,000	**1.9%**
Ontario	1,000	**1.0%**	1,000	**1.0%**	1,500	**1.5%**	1,500	**0.9%**
Other Canada	1,500	**1.5%**	1,500	**1.5%**	1,500	**1.5%**	1,500	**0.9%**
USA	3,000	**3.0%**	3,000	**3.0%**	3,600	**3.6%**	3,600	**2.3%**
Germany	1,000	**1.0%**	1,000	**1.0%**	1,800	**1.8%**	1,800	**1.1%**
Australia	500	**0.5%**	500	**0.5%**	800	**0.8%**	800	**0.5%**
Japan	500	**0.5%**	500	**0.5%**	800	**0.8%**	800	**0.5%**
Other International	1,500	**1.5%**	1,500	**1.5%**	2,000	**2.0%**	2,000	**1.3%**
Distributed by CANADA TOURISM COMMISSION	**4,500**	**4.5%**	**6,000**	**6.0%**	**8,000**	**8.0%**	**9,500**	**5.9%**
USA Locations	2,000	**2.0%**	2,000	**2.0%**	3,000	**3.0%**	3,500	**2.2%**
Germany	1,500	**1.5%**	2,000	**2.0%**	2,500	**2.5%**	3,000	**1.9%**
Australia	500	**0.5%**	800	**0.8%**	800	**0.8%**	1,000	**0.6%**
Other International	500	**0.5%**	1,200	**1.2%**	1,700	**1.7%**	2,000	**1.3%**
Distributed at TRADE EVENTS	**7,000**	**7.0%**	**8,500**	**8.5%**	**9,000**	**9.0%**	**65,500**	**40.9%**
TRAVEL TRADE	**6,000**	**6.0%**	**7,000**	**7.0%**	**7,500**	**7.5%**	**7,500**	**4.7%**
Canada's West Marketplace (CWM)	3,000	**3.0%**	3,000	**3.0%**	3,000	**3.0%**	3,500	**2.2%**
Rendez-vous Canada	3,000	**3.0%**	3,000	**3.0%**	3,500	**3.5%**	4,000	**2.5%**
BC Outdoor Show	---	**0.0%**	1,000	**1.0%**	1,000	**1.0%**	---	**0.0%**
CONSUMER	**1,000**	**1.0%**	**1,500**	**1.5%**	**1,500**	**1.5%**	**58,000**	**36.3%**
Website Requests	1,000	**1.0%**	1,500	**1.5%**	1,500	**1.5%**	2,500	**1.6%**
2010 Olympics Games Time	---	**0.0%**	---	**0.0%**	---	**0.0%**	55,500	**34.7%**
TOTAL DISTRIBUTED...	**100,000**	**100.0%**	**100,000**	**100.0%**	**100,000**	**100.0%**	**160,000**	**100.0%**

	2006/07	%	2007/08	%	2008/09	%	2009/10	%
Total for International multiple distribution methods								
Germany	2,500	**2.5%**	1,000	**1.0%**	1,800	**1.8%**	1,800	**1.1%**
Australia	1,000	**1.0%**	500	**0.5%**	800	**0.8%**	800	**0.5%**
USA	5,000	**5.0%**	3,000	**3.0%**	3,600	**3.6%**	3,600	**2.3%**
Other International	2,000	**2.0%**	1,500	**1.5%**	2,000	**2.0%**	2,000	**1.3%**

For the 2010 Winter Olympics, AtBC produced a lure brochure called "Passport to Aboriginal Cultural Tourism in BC" to capture BC and Canada access points through distribution of 45% through BC visitors centres and again through the 2010 Winter Games Time consumer event (**Table 11**).

Table 11 – Passport to Aboriginal Cultural Tourism in BC lure brochure 2009/10

TARGET / QTY PRINTED	120,000	%
BRITISH COLUMBIA	**54,000**	**45.0%**
Vancouver Coast	12,000	**10.0%**
Vancouver Island	10,000	**8.3%**
Thompson Okanagan	8,000	**6.7%**
Northern BC	8,000	**6.7%**
Kootenay Rockies	8,000	**6.7%**
Cariboo Chilcotin	8,000	**6.7%**
BC TOURISM	**15,000**	**12.5%**
Alberta	3,000	**2.5%**
Ontario	1,500	**1.3%**
Germany	1,800	**1.5%**
Australia	800	**0.7%**
USA	3,600	**3.0%**
Japan	800	**0.7%**
Other International	2,000	**1.7%**
Other Canada	1,500	**1.3%**
TRADE EVENTS	**51,000**	**42.5%**
TRAVEL TRADE	**5,500**	**4.6%**
Canada's West Marketplace	2,500	**2.1%**
Rendez-vous Canada	3,000	**2.5%**
CONSUMER	**45,500**	**37.9%**
Website Requests	2,500	**2.1%**
2010 Olympics Games Time	43,000	**35.8%**
TOTAL DISTRIBUTED…	**120,000**	**100.0%**

After AtBC launched the Aboriginal Cultural Tourism Authenticity program in 2009/10, it also produced 1000 copies of the Authenticity program rack card which it self-distributed to the travel trade at *Rendez-vous Canada* and *Canada's West Marketplace*. The card featured the first five approved Aboriginal cultural tourism experiences and provided information on the program.

3.3.3 Outreach – Public, Travel Trade and Industry Relations

AtBC annually attends three trade and consumer events as an exhibitor – Canada's West Marketplace (CWM), Rendez-vous Canada (RVC), and the BC Outdoor Show. These events are "the" place to be to connect with the travel trade to promote them of the new products, gain feedback on their experience and to stay connected. CWM and Rendez-vous are not accessible to most AtBC stakeholders, so AtBC's ongoing presence is extremely important to maintain the growth of the Aboriginal tourism industry. Add to this the absence of other regional Aboriginal tourism associations in Canada and the magnitude of importance of AtBC's presence inflates.

Trade Events

In 2009/10, AtBC focused its energy on CWM, Rendez-vous, and especially the Olympics and did not participate in the BC Outdoor Show.

- **Canada's West Marketplace** – Since 1989, Canada's West Marketplace has together BC and Alberta tourism industry suppliers with approximately international and domestic tour operators/wholesalers. In 2003, delegate attendance was over 650 buyers and sellers. By invitation only, it is a proven event that results in business through the exchange of information at pre-scheduled appointments, open sessions and networking, and attracts international travel media.
- **Rendez-vous Canada (RVC)** – Very much like CWM, this national international tourism industry event is a marketplace which brings together buyers and sellers who meet in 12-minute appointments over four-days; approximately 20,000 appointments are pre-secheduled. Business is conducted between Canada's tourism industry sellers, Destination Marketing Organizations (DMOs) and international buyers (foreign tour operators, wholesalers and packagers), with admission being by invitation only qualified and nominated under established RVC guidelines by the Canadian Tourism Commission staff in Canadian Embassies, high Commissions, Consulates, and Trade offices overseas and in the USA. Again, like CWM, it is a crucial event for AtBC to be present at to represent and promote BC's Aboriginal tourism industry and operators, and to collect industry intelligence.

Fam (familiarization) Tours

AtBC's involvement with fam tours was through Tourism BC and regional tourism offices as a referral, and then in 2009/10 AtBC became more active in coordinating fam tours for the travel trade and travel media. This approach was partly due to the lack of experience and reputation of AtBC; essentially, AtBC was a new comer to the industry, along with Aboriginal tourism operators, and had to become established before confidence could be established. In 2008/09, AtBC coordinated three fam tours in 2008/09, five in 2009/10, and another two in 2010/11. Clearly interest in Aboriginal tourism and AtBC's involvement in fam tours in 2009/10 was sparked by international media who were seeking stories leading up to the 2010 Winter Olympics, and as well by AtBC's capacity to respond to these queries in the period preceding the Games.

The fam tours focused heavily on the tourism sectors of Aboriginal culture, outdoor adventure, wildlife viewing and historical sites, and of course, the accommodations that support these attractions. In every of the 11 fam tours hosted 2008-2010, media and interest was North American, with several journalists being focused on Asian markets over the period, and then in summer 2009 other market focus was German and the UK.

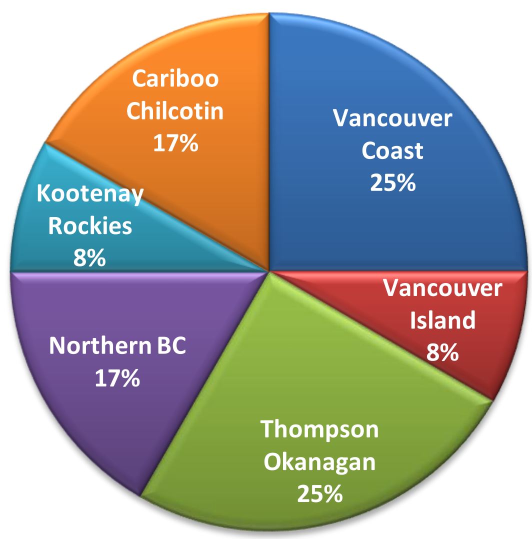
The fam tours were mostly for media, and consequently resulted in generating over 110 print and electronic stories. The 35 fam tour participants visited 61 Aboriginal tourism sites (**Table 12**).

Table 12 – Fam Tours 2008-2010

	2008/09	2009/10	2010/11	TOTAL
TOTAL TOURS	**3**	**5**	**2**	**10**
# Print Stories	11	56	11	78
# Electronic Stories	7	40	7	54
Fam Attendance #	2	27	6	35
# Aboriginal Tourism Sites	14	37	10	61
REPRESENTATIVES FROM:				
Media Fam Tours	11	20	4	35
Travel Fam Tours				0
Other	11	7	1	19

From 2008-2010, each tourism region benefited from exposure in the fam tours, with the Vancouver Coast & Mountains and Thompson Okanagan tourism regions each receiving three fam tour visits (**Figure 8**).

Figure 8 – Fam Tours by Tourism Region 2008-2010



3.3.4 Advertising of Aboriginal Tourism

AtBC developed and placed several targeted consumer and travel trade advertisements during the period January 1, 2008 to August 31, 2009. The goal of the consumer advertisements were to create awareness, interest and purchase intention in key domestic and international target markets. Overall, 26 print ads were developed and placed with 11 different publications at staggered points in the reporting period.

About a quarter (5) of the travel trade advertisements focused on communicating with key domestic and international operators. The placements were in publications that had a combined travel industry reach of about 125,000 tour wholesalers, operators, and travel agents, many of whom distributed products and services to consumer markets of direct interest to AtBC. One publication, *Canadascope* has total circulation, via hard copy print of 17,000 to qualified tourism organizations in 113 countries.

Consumer targeted communications represented the bulk of the print advertising done by AtBC. Overall, these advertisements were placed in publications that had a combined circulation and potential reach of about 640,000 domestic and international readers. Some of these publication venues were used by AtBC on a repetitive basis. Overall, this exposure generated an estimated 2.5 million consumer messages about Aboriginal tourism in BC that were distributed to potential and / or actual visitors to this province. While some of the publications serviced both domestic and international markets, about three-fifths (62%) of the advertisements targeted international markets (especially in the US). The remainder (38%) focused primarily on domestic market and more specific market niches pertinent to BC.

3.3.5 Media and Publicity Activities

BC has pursued a varied of media focused strategies to gain publicity and other related advantages that promote Aboriginal tourism in the province. These include arranging interviews, familiarization tours, image exchanges, story lines, as well as participating in broader promotional media events. From January 2008 to August 2009, AtBC helped facilitate and track the media's promotion of Aboriginal tourism initiatives and member activities in BC. Overall, in excess of 117 media based information releases (print, radio, television, blog) were generated. While it is difficult to fully estimate the impact and value of this media exposure, the commercial value of purchasing this space is in excess of an estimated $790,000.

While always important, the significance of managing media relations became a priority with the recognition of the unprecedented media leveraging opportunity the *2010 Winter Games* provided. Consequently through the last half of 2009 and 2010, it developed and delivered a focused media relations strategy and program for the organization and its stakeholders. In this respect, AtBC worked closely with its partners to embed stories and images of Aboriginal culture and related tourism experiences into the publications and productions of various print, on-line and broadcast organizations. Through its pre, during and post Olympic media relations programs, it helped develop Aboriginal tourism related content that media representatives could readily incorporate into their messaging. These efforts resulted in unprecedented levels of media exposure through print, television and on-line publications.

Media tracking data (Media Miser 2010) provide useful indications of the amount, reach and estimated advertising value of print media publications related to BC's Aboriginal culture and related tourism experiences generated. In 2010, an estimated 930 Canadian or US publications produced and distributed reports on BC based Aboriginal-related experiences to their respective audiences. Slightly more than half (56%) of these publications (528) were produced by Canadian publishers. Collectively these Canadian and US publications had an estimated combined circulation of more than 753.7 million potential readers. Slightly more than half (52%) of this circulation (389 million) was linked to US publishers. The estimated 2010 advertising value of these leveraged publications was about $6.9 million dollars in 2010. About 71% ($4.1 million) of the advertising value was associated with publications distributed by US publishers.

Canadian print publications represented about 56% of all relevant print publications, and produced by Canadian and US media outlets in 2010 (**Table 13**). Only Canadian based print media publication data related to BC's Aboriginal and related cultural experiences were tracked for in 2009 and 2010. While there was a clear drop (29%) in the number of tracked Canadian publications generated between 2009 and 2010, a dramatic jump (453%) in overall Canadian circulation happened in this same time period. This increase in circulation was accompanied with a striking (24%) increase in the value of advertising leveraged through these publications (**Table 13**). Not surprisingly, print media interest in Aboriginal related culture and experiences in BC peaked during the months of January through March of 2010 when the Olympic Games were top of mind for most media outlets. Overall Canadian publications reported a 2442% increase in related Aboriginal content during this period, compared to a similar time in 2009. While not solely Aboriginal focused, this exposure in both the domestic and international media is unprecedented, and plays a key role in maintaining and strengthening consumer awareness of British Columbia's Aboriginal tourism partners and businesses.

Table 13 – Aboriginal and Related Cultural Print Media Coverage of BC 2009-2010

Year	# of publications	Circulation	Advertising Value
Canadian Print Media			
2009	740	66,008,173	2,281,896
2010	528	365,079,237	2,832,401
% Canadian change 2009/2010	**-28.6%**	**453.1%**	**24.1%**
US Print Media			
2010	402	388,547,063	4,014,764
Total Canadian and US 2010	**930**	**753,626,300**	**6,847,165**

(Source Miser Media, 2009, 2010)

**The print media coverage searched for the terms: Aboriginal, First Nations, Totems, Native, Indigenous, Culture*

3.3.6 Website Marketing / Online Reach

Because of the emerging nature of the AtBC managed website, it was neither well equipped nor appropriately positioned to capture significant viewer attention during this period. Until relatively recently it was more corporate than consumer focused in its content. As a consequence, most consumer oriented information about Aboriginal tourism was featured on the province's official tourism destination website.

In cooperation with Tourism BC, AtBC commenced increasing its postings of Aboriginal tourism content on Tourism BC's website in 2008. Once posted, traffic to the Aboriginal and other related culture pages began increasing from 25,673 in 2008 to 51,843 in 2010 (see **Table 14**). This represented about a doubling of estimated page views in that time period. While, overall gains were relatively limited (12%) between 2009 and 2010, page views more than doubled (226%) during the peak month of the Olympic Games in February 2010 compared to the same month in 2009. They were also four times (409%) more page views in that Olympic month compared to February 2008.

Table 14 – Page Views to Aboriginal and Cultural Content Pages 2008-2010

	2008	2009	2010	% Change 2008-2010
January	1,419	3,472	5,079	257%
February	1,672	3,791	8,514	409%
March	1,738	4,483	5,597	222%
Total Annual Page Views	**25,673**	**45,767**	**51,843**	**100%**

3.4 NEW AND SPECIAL INITIATIVES

AtBC created and implemented a Marketing and Media Program for Aboriginal tourism during the 2010 Winter Olympic Games in Vancouver; AtBC continues to look for opportunities in the Olympic afterglow, and has become a news source for media who are following-up on the benefits created by the Olympic Games.

- **Klahowya Village** – In the summer of 2010, AtBC with the endorsement of the Squamish, Tsleil-Waututh and Musqueam First Nations, established Klahowya Village in Vancouver's Stanley Park, of which 160,000 people visited (in the pilot year), and was supported with a marketing partnership with Vancouver Trolley Company (an independent tour operator). The Village also employed 42 Trailblazers during the summer, and partnered at the end of the season with the BC Government BladeRunners program (managed by the Aboriginal Community Career Employment Services Society (ACCESS)) to train 30 at-risk Aboriginal youth in the hospitality industry.
- **Aboriginal Cultural Kiosk** – AtBC's relationship with Tourism Vancouver resulted in the establishment of an Aboriginal cultural tourism kiosk at the main tourism visitor centre in Vancouver which receives 6,000 visitors a week during peak season. Vancouver is also viewed by the tourism industry as the 'gateway' to the rest of BC and an important entry point for western Canada; recognizing this, this kiosk is viewed as an important strategic initiative to building the awareness of Aboriginal tourism opportunities to visitors which will inspire them to travel beyond the gateway.

4 Aboriginal Tourism Performance

The following section provides estimated measures of Aboriginal tourism performance during AtBC's implementation of the AtBC Tourism Blueprint Strategy from 2006 to 2010. Given its close association and dependence on broader tourism travel trends, it is reasonable to assume that Aboriginal tourism's performance patterns will reflect many of BC's general tourism patterns. However, it is also important to note that because of Aboriginal tourism's relatively small size; even small absolute increases in performance represent substantial increases in not only statistical performance indicators, but also real advances for Aboriginal tourism operators and their communities. (Further information concerning the calculation of the performance measures is provided in **Appendix 1: Summary of Report Performance Indicator Definitions, Calculations and Sources**.)

4.1.1 First Nations / Aboriginal People

The interest by First Nations, the Métis community and Aboriginal people in British Columbia has continued to increase since implementation of the Blueprint strategy. This can be attributed to improvements in AtBC's operating structure, the partnerships established with First Nations, the tourism industry and private sector, increased resources, and implementation of strategic activities. As AtBC's notoriety and involvement with the Aboriginal community through workshop, outreach and communications activities, and restructuring of AtBC's membership program to a stakeholder program that has explicit marketing benefits, the number of active members / stakeholders. AtBC's outreach activities reflect the increased awareness by BC First Nations and Aboriginal tourism operators and Aboriginal people represents 53% of activities (**Table 15, page 5**).

4.2 ABORIGINAL TOURISM VISITOR ESTIMATES

4.2.1 Incidence Levels

Aboriginal tourism visitation volumes are quite dependent on capturing a share of those visitors already travelling in BC. The share of those visitors who participate in Aboriginal tourism cultural activities is referred to as the incidence level. Incidence levels are dependent on how many people are aware of, interested in, and able to access the kind of Aboriginal experiences they are seeking. As such, the promotional and product development activities of AtBC, entrepreneurs, and other tourism organizations play significant roles in determining incidence levels.

During the period 2006 to 2008, incidence levels for BC's Aboriginal tourism products increased in all of the province's key markets. Overall levels increased from about 13% in 2006 to an estimated average of 22% in 2010. This represented a 69% rise over 2006 levels. Given the tremendous exposure Aboriginal culture received during the 2010 Olympic Games and the accelerated marketing efforts of AtBC and its tourism industry partners to promote Aboriginal tourism, it is reasonable to assume that current incidence levels will remain as good as if not better than those existing in 2010 (**Table 15**).

Table 15 – Estimated Aboriginal Tourism Incidence Rates by Market 2006-2010*

Market	2006 (%)	2007 (%)	2008 (%)	2009 (%)	2010** (%)	% Change 2006/2010
BC	9	11	15	15	15	88
Domestic	17	11	17	17	17	0
US	22	22	31	31	31	41
Other	34	38	37	37	37	8
Overall	13	17	22	22	22	69%

**Incidence data record % of visitors taking part in at least one of a range of Aboriginal tourism pursuits during their visit. They do not indicate frequency or duration of participation during the visit.*
***Based on Tourism BC Visitor Survey (2008) incidence statistics.*

Further evidence supporting this position is reflected in Global Tourism Watch's data which measures various aspects of international market awareness, interest and visitation in Canada's tourism products and experiences. Their data for 2009 suggests that for the most part, interest in experiencing Aboriginal culture and celebrations remain quite strong and stable in most of Canada's key international markets. It is highest in China (~86%) and lowest in the United States (~42%). However, British Columbia's ability to convert this latent interest into actual tourism visits is stronger than that for Canada in general. In all international markets where such data is collected BC's (except Japan) Aboriginal experience incidence rates are higher than those for Canada in general **(Table 16**).

Table 16 – Aboriginal Culture / Attraction International Market Appeal 2009

Indicators of Interest /Engagement	USA (%)	Australia (%)	Germany (%)	France (%)	UK (%)	South Korea (%)	Japan (%)	China (%)	Mexico (%)
Interest in experiencing Aboriginal culture / attractions (2009)	42	43	74	78	42	56	51	86	61
Interest in experiencing Aboriginal culture / attractions (2008)	42	43	74	78	42	56	51	86	86
Canadian Aboriginal culture/ attraction experience incidence	n/a	28	26	41	19	45	20	19	56

BC Aboriginal culture / attraction experience incidence	n/a	34	33	46	28	47	18	n/a	59

Source Global Tourism Watch (2009)

4.2.2 Tourism Volume Estimates

Overall tourism flows to BC provide Aboriginal tourism operators with access to markets. Each market varies in its size and interest in Aboriginal tourism. A combination of market size and incidence rates determines the overall volume of Aboriginal visits generated. Based on currently reported overnight visitor flows (BC MTCA, 2011) and BC Aboriginal tourism incidence levels (TBC 2009), it is clear that overnight travel to BC involving visits to Aboriginal attractions /services almost doubled (+97%) to about 3.7 million overnight visits between 2006 and 2010. This is quite remarkable considering that overall overnight tourism flows to BC only slightly increased during this same time period. During the 2010 Olympic year, Aboriginal tourism flows jumped about 18% over 2009 levels. Furthermore, Aboriginal tourist traffic is forecasted to continue increasing to about 3.9 million overnight visitors by 2012. This represents an escalation of 107% over 2006 levels (**Table 17**). Much of this increase is due to the higher Aboriginal tourism incidence rates related to the improved awareness, interest and availability of Aboriginal tourism products and services nurtured since 2006.

Table 17 – Estimated Aboriginal Tourist Overnight Visits 2006-2012 (000's)

Market	2006	2007	2008	2009	2010	2011	2012	% Change 2006-2010	% Change 2009-2010
Domestic	962	1,093	1,496	1,573	1,981	2,024	2,085	106%	25.96%
US	598	747	969	1,022	1,101	1,095	1,128	84%	7.74%
Other	315	462	549	538	608	643	662	93%	12.90%
Overall	**1,875**	**2,302***	**3,014***	**3,133***	**3,689**	**3,761****	**3,874*****	**97%**	**17.77%**

**Based on Aboriginal incidence shares (TBC 2008), *Incidence data record % of visitors taking part in at least one of a range of Aboriginal tourism pursuits during their visit. They do not indicate duration of participation during the visits, or necessarily visits to individual Aboriginal tourism businesses.*
***Based on overnight visitor volumes (BC MTCA 2011).*
****and 2012 Conference Board of Canada forecasts (2009).*

4.2.3 Tourist Expenditure Estimates

Overall expenditures by visitors to Aboriginal attractions and services are dependent on the volume of visits generated and the typical 'spend' of those travelers. Tourism BC 2008 data suggest that on average Aboriginal visitors spend about the same amount daily on their trips as do other overnight travelers to BC, but their trips in the province are about 65% longer (avg. ~17 days). As a consequence, their overall expenditure is more (Tourism BC 2008) than average overnight travelers to BC. However, the proportion of their total trip time engaged in Aboriginal tourism is estimated to be comparatively limited (~6%), as is the role of Aboriginal tourism in motivating the travel in the first place (~34%) (AtBC Consumer Survey Report, 2003). With these conditions in mind, it is estimated that Aboriginal tourism expenditures in BC reached about $40 million in the 2010 Olympic year. This represents a 6% increase in total Aboriginal tourism spending in the Olympic year over 2009 levels, and a doubling (100%) over 2006 levels. Based on Conference Board of Canada visitor flow estimates, it is forecasted that Aboriginal tourist revenues will jump to $43 million by 2012, a 115% increase over 2006 levels **(Table 18**).

Table 18 – Estimated Aboriginal Tourist Expenditures ($ millions) 2006-2012

	2006	2007	2008	2009	2010	2011	2012	% Change 2006-2010	% Change 2009-2010
All BC*	7,498	7,597	8,136	7,612	8,047	8,417	8,804	7%	6%
Aboriginal related BC**	20	26	37	38	40	42	43	100%	6%

**Based on BC MTCA Tourism estimates of actual and forecasted visitor volumes and expenditures to 2011 and Conference Board of Canada (2009) forecasted visitor volume growth rates for 2012.*
*** Based on estimated Aboriginal trip incidence rates (TBC, 2008), share of total BC trip days and share of trip purpose (AtBC 2003)*

4.2.4 Tourism Tax Revenue Estimates

Tourist expenditures generate a variety of tax revenue streams for Canada's municipal, provincial and federal governments. Based on estimated tax to revenue ratios for BC (BCMTCA 2007, COTA 2009) and overall Aboriginal tourist expenditures, various levels of government received about $11.32 million in tax revenues in 2010. This was approximately 5% more than 2009. About 51% of these revenues ($5.1 million) flowed to the federal government, while 40% and 9% respectively were distributed to provincial and local governments. Forecasts to 2012 suggest that Aboriginal tourism tax revenues will escalate to $ 12.2 million by 2012 (**Table 19**). This represents a potential increase of about 13% increase over 2009 levels. These estimates do not account for the full effects of the recently implemented Harmonized Sales Tax (HST on Aboriginal businesses)*.

Table 19 – Estimated Aboriginal Tourism Tax Revenues Generated ($ millions) 2009-2012

	2009	2010	2011	2012	% Change 2009-2012	% Change 2009-2010
Federal	$ 5.5	$ 5.8	$ 6.1	$ 6.3	13%	5%
Provincial	$ 4.3	$ 4.5	$ 4.7	$ 4.8	13%	5%
Municipal	$ 1.0	$ 1.0	$ 1.1	$ 1.1	13%	5%
Overall	**$ 10.8**	**$ 11.3**	**$ 11.9**	**$ 12.2**	**13%**	**5%**

** Revenue to tax ratios based on MCTA Tourism Action Plan (2007) and COTA estimates (2009).*
*** Projected impact of proposed HST on overall net taxation is in the 'order of magnitude of 285% for all service industries (CO TA HST Draft Report 2009 and CD Howe Institute, 2009).*

4.2.5 Tourism Business Estimates

Growing awareness and demand for Aboriginal tourism products and services, as well as the increasing opportunities and capacities of Aboriginal and Métis people to become involved with tourism ventures is fuelling growth in Aboriginal tourism businesses in BC. This Audit report identified the presence of 221 Aboriginal tourism businesses at the end of 2010. This represents a 101% increase over the 110 identified in 2006 (**Table 20**); this increase is not all related to the creation of new businesses.

On average, the reporting operations were about 10.3 years old (AtBC Business Survey 2011). About a fifth (~23%) of them indicated that the business began operating between 2006 and 2010. (About 3% were established in 2009 or 2010.) The remaining (~77%) of them reported operating their enterprises prior to the implementation of many of AtBC's Blueprint programs.

The substantial increase in the number of these businesses is probably due to a combination of factors that have collectively created a greater willingness and capacity amongst Aboriginal tourism entrepreneurs and communities to participate in this fledgling tourism sector. The factors include a growing Aboriginal:

» awareness of market demand for Aboriginal tourism products and services;

» network of business 'readiness' support (e.g. AtBC marketing and business development training programs);

» set of strategic alliance building opportunities with well-established tourism partners (e.g. travel trade, tourism destination marketing organizations, government organizations, corporate sponsors etc.); and

» confidence in the ability of AtBC to help them raise the profile of authentic Aboriginal cultural tourism products and services in BC.

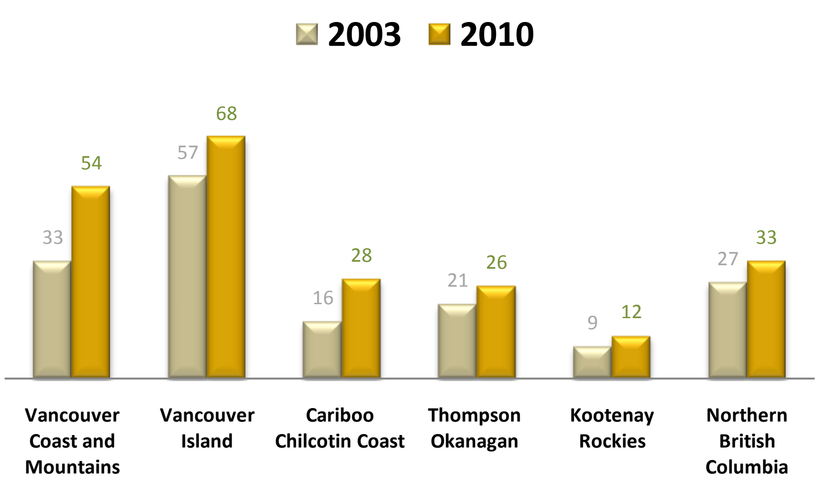
Table 20 – Aboriginal Tourism Business Inventory 2006-2010

Businesses	2006[1]	2009[2]	2010[3]	% Change 2006-2010
Total	110	131	221	101%

[1] *Based on AtBC Business Survey data, 2006*
[2] *Based on extrapolation of AtBC survey data from 2006 benchmark and personal communications with funding institutions (2008/09)*
[3] *AtBC business survey inventory (2011)*

Growth by tourism region is consistent with Vancouver Island (68, 31%) and Vancouver Coast and Mountains (54, 24%) combined having over half (55%) of the Aboriginal tourism businesses in British Columbia (**Figure 9**).

Figure 9 – Aboriginal Tourism Businesses by Tourism Region 2003-2010



Since 2003, the types of Aboriginal tourism businesses have grown consistently in all sectors, except in Festivals and Events. The decline in Festivals and Events is primarily due to the categorization of the Aboriginal member as a full stakeholder or associate stakeholder, and that AtBC does not provide services that directly identify, benefit or attract Aboriginal festivals and events, which the 2003 survey did specifically seek. Many Aboriginal festivals and events are associated with First Nations and Aboriginal tourism attractions (i.e., museums), and therefore likely included in those categories. The largest tourism sector remains Outdoor Adventures (31%) closely followed by Attractions (23%) and Accommodations (17%) (**Table 21**).

Table 21 – Aboriginal Tourism Business type 2003 and 2010

TOURISM SECTOR – Primary Type	2010		2003		Change	
Attraction	51	**23%**	36	**21%**	15	**42%**
Accommodations	37	**17%**	26	**15%**	11	**42%**
Outdoor Adventure	68	**31%**	40	**24%**	28	**70%**
Food and Beverage	9	**4%**	7	**4%**	2	**29%**
Festivals and Events	16	**7%**	23	**14%**	-7	**-30%**
Retail	31	**14%**	28	**17%**	3	**11%**
Transportation	9	**4%**	8	**5%**	1	**13%**
TOTAL…	**221**	**100%**	**168**	**100%**	**53**	**32%**

4.2.6 Tourism Employment Estimates

Aboriginal tourism businesses reported employing about 16 people during the peak tourism season operations (mid-June to early September) in 2010 (AtBC Business Survey 2011). Taking into account variations in seasonal employment levels and complements of full and part time employees, on average each firm employed about 10.25 full-time equivalent people. Based on the number of firms identified as operating in 2010 and the average number of employees per firm reported, the estimated overall Aboriginal tourism business FTE complement in 2010 was about 2,266 people (**Table 22**). Overall, this exceeded estimated 2006 levels by about 32%. In addition, about half (54%) of the reporting operations indicated that they expected to continue growing their complement of employees over the next five years (AtBC Business Survey 2011).

Table 22 – Tourism Employment FTE Estimates 2006-2010

Jobs	2006[1]	2008[2]	2009[3]	2010[4]	%Change 2006-2010
Full-time	1,454	1,679	1,708	1,857	28%
Part-time	264	305	310	409	55%
Overall	1,718	1,984	2,018	2,266	32%

Based on:

1. Based on reported employment levels /firm in AtBC Business Survey, 2006 (i.e. 13.22 FT and 2.40 PT positions / business).

2. Based on extrapolations of 2006 employment /business, and estimated growth rates for employees and businesses for '07, '08 and '09. Estimates informed by personal communications with regional Aboriginal funding agencies to 2008.

3. Based on extrapolations of 2008 bench marks.

4. Based on reported Aboriginal business estimates and average employee / business ratios (AtBC Business Survey 2011), and personal communications 2011 (i.e. 8.4 full-time FTE and 1.85 Part-time FTE positions / business). While the number of persons employed during the peak season in 2010 approximates levels identified in 2006, the actual FTEs are lower probably due to relatively smaller year round needs of many of the businesses in operation.

4.3 BUSINESS PERCEPTIONS ON OUTCOMES OF ATBC RELATED ACTIVITIES

Over the past five years AtBC has developed and delivered a range of human capacity building, product development and marketing programs. In combination they were designed to advance the development and performance of the province's emerging Aboriginal tourism industry. While the industry's performance is influenced by a combination of factors that extend well beyond those that AtBC can control, its activities were designed to assist this sector's development. Based on the preceding description of the organization's activities, it is clear that substantial advancement has happened on a variety of fronts. Aboriginal tourism business responses support this view (AtBC Business Survey, 2011).

In an era of slackening tourism market growth and diminishing business opportunities, BC's Aboriginal tourism industry has grown on a variety of fronts. While concerned about on-going recession challenges, business respondents report stable if not strong positive growth in their various aspects of their business operations (**Table 23**). In particular, they were most positive about the growth they had experienced over the past three years with respect to increased revenues (54%), and marketing program comprehensiveness (47%).

Table 23 – Perceptions of Change in Aboriginal Tourism Business Operations 2007-2010

Business Operation Feature	Decreased	Remained the Same	Increased Somewhat	Increased a Lot	Overall Growth
Business revenues produced	17.9	28.6	42.9	10.7	53.6
Marketing program comprehensiveness	10.7	42.9	28.6	17.9	46.5
Competitiveness of tourism products / services	7.1	46.4	39.3	7.1	46.4
Number of people employed	14.3	50.0	35.7	0.0	35.7
Number of operating days annually	10.7	64.3	21.4	3.6	25.0

n=45

4.3.1 Stakeholder Perceptions of AtBC's Contributions to 2011

As AtBC grows in its ability to develop and deliver professional development support and marketing programs aligned with the needs and capacity of its stakeholders, so will its reputation amongst its business and government stakeholders. Business survey data (AtBC Business Survey 2011) suggests that at least half of all reporting Aboriginal tourism business operators believed that AtBC was playing a positive role in positioning the industry for greater success. In particular, almost all of the respondents (96%) felt that AtBC was influential in increasing global awareness of Aboriginal tourism in BC, as well as building partnerships with inbound and receptive tour operators. Those feelings about AtBC's positive contributions to the industry were followed closely by others which acknowledged the organization's positive contributions to the delivery of tourism and customer service training programs for Aboriginal employees (86% approval) (**Table 24**). Even its efforts to increase job opportunities for Aboriginal people receive overall positive ratings by half (51%) of the Aboriginal business respondents surveyed in 2011.

Table 24 – Perceived Role of AtBC in Supporting Aboriginal Tourism in BC 2007-2010

AtBC Role	Not at All	Somewhat	A Lot	Overall Positive Role
Increasing global awareness of Aboriginal tourism in BC	3.6%	50.0%	46.4%	96.4%
Building partnerships with inbound and receptive tour operators	3.6%	35.7%	60.7%	96.2%
Delivering tourism and customer service training programs for Aboriginal employees	14.3%	60.7%	25.0%	85.7%
Increasing job opportunities for Aboriginal people	3.6%	32.1%	28.6%	50.7%

n=45

5 Summary

The preceding description suggests that AtBC has made considerable strides either directly or indirectly nurturing, and accelerating the development of Aboriginal tourism in BC. From a demand perspective, during AtBC's existence, visitor awareness, visitor incidence, visitor volumes, visitor expenditures and associated contributions to taxes have grown substantially. This has happened despite on-going challenges to growth in tourism not only in BC, but across Canada.

From a supply perspective, AtBC is assuming a growing role in shaping the character and professionalism of Aboriginal tourism's products and services in BC. Through its successful development and increasing implementation of its portfolio of Aboriginal tourism capacity building programs (i.e., Trailblazers), it is well positioned to help the growing number of Aboriginal tourism operators increase the market readiness of their operations. In addition, AtBC's growing network of Aboriginal stakeholders, corporate partners, and supportive government organizations offer a strong foundation on which to configure Aboriginal tourism products and services for future success.

It is difficult to separate out AtBC's specific role from that of its many supportive stakeholders and partners in spurring on Aboriginal tourism's positive performance since 1996. However, despite some early growing pains it is clear that the growing sophistication and reach of the organization's marketing, training and partnering efforts are making a difference. Collectively, these initiatives have not only increased the profile of Aboriginal tourism successes in the minds of consumers, but they have also raised the confidence of a critical sizeable group of Aboriginal tourism stakeholders and the travel trade about future prospects for the Aboriginal tourism sector of BC's tourism economy.

Appendix 1: Summary of Report Performance Indicator Definitions, Calculations and Sources

1) **INCIDENCE LEVELS:** % share of travelers and/or their travel party visiting a First Nation attraction or event while on their BC trip.

   Source: *Tourism BC Visitor Information Centre Intercept Surveys 2006-2008. Special data cuts (October 2009)*

   Calculation: Weighted average of Aboriginal incidence rates for all survey locations in each survey year

   Assumption: Incidence rates identified in the Tourism BC surveys are representative of those across the province.

2) **ABORIGINAL TOURIST VISITS:** # of overnight travelers visiting Aboriginal attractions /events as part of their BC trip

   Source: *Tourism BC overall visitor estimates, 2006-2009; MTCA estimates 2010 and 2011 (January 2011) Conference Board of Canada overall visitor estimates 2012 (September 2009)*

   Calculation: Overall tourism visit estimates (000's) / Overall average Aboriginal incidence rate by year.

   Assumptions: Tourism visits will increase at least the same rate as those forecasted by MTCA 2011, and Aboriginal tourism incidence rates will remain stagnate through 2008-2012.

3) **OVERALL TOURIST EXPENDITURES:** Overall $s (millions) spent collectively by overnight travelers who included visits to Aboriginal attractions/ events in their BC trips

   Sources: *Tourism BC overall visitor expenditure estimates, 2006-2011 (Jan, 2011) Conference Board of Canada overall visitor expenditure estimates, 2012 (September 2009); Tourism BC Visitor Information Centre Intercept Survey special First Nation incidence and expenditure data cuts 2006-2008); Aboriginal Blueprint Strategy Consumer Survey –trip reason cut (AtBC 2003).*

   Calculation: Overall estimated tourism revenue x Weighted average Aboriginal tourist incidence rate x Estimated Aboriginal share of overall BC trip length (6%) x Aboriginal share of trip reason (34%)

   Assumption: Expenditures will increase at least the same rate as those estimated by MTCA through 2011 (January 2011) and Tourism the Conference Board of Canada in 2012 (+5%)

4) **TAX REVENUES:** Government tax revenues generated for federal, provincial and local governments via tourism activity including Aboriginal attractions / events.

   Sources: *Tourism revenue to tax ratios based on the Council of Tourism Associations report: The Impact of Sales Tax Harmonization on the British Columbia Tourism Industry (October 2009)*

Calculation:

- **Federal tax revenue:** Overall Aboriginal tourist expenditure estimates x Federal tourist revenue to tax ratio (14.5%)
- **Provincial tax revenue:** Overall Aboriginal tourist expenditure estimates x BC tourist revenue to tax ratio (11.2%)
- **Municipal tax revenue:** Overall Aboriginal tourist expenditure estimates x Avg. BC municipal tourist revenue to tax ratio (2.6%)

Assumption: No specific data concerning Aboriginal tourist revenue to tax ratios exists. This report's assessment of tax revenue impacts assumes that the tourist revenue to tax ratios will be similar as those for tourism in BC. Similarly, no forecast of the impact of the Harmonized Sales Tax on Aboriginal tourism was available at the time of this report's preparation. This report uses estimates developed for BC tourism in general as its benchmark. Overall it is anticipated that the HST will result in increased taxes in 16 of BC's 20 tourism product sectors, for an average overall increase of 4.66% in the average price of tourism related products and services (Council of Tourism Associations, October 2009). Due to the unknown character of this tax on Aboriginal tourism operations, the HST has not been included in the tax revenue estimates.

5) **TOURISM BUSINESSES:** Operating Aboriginal cultural tourism attractions, events, food and beverage, accommodation, tour operations, and other related establishments.

Sources: *AtBC Business Survey, 2006; Aboriginal funding institution inquiries (Pers. Comm. 2009); BC Stats, Tourism related establishments and employment data (BC Stats 2008); AtBC Tourism Business Inventory 2010 (Jan 2011).*

Calculation: 2006 BC base + reported annual absolute increases in operated and /or expanded businesses - # of businesses reported x Avg. BC business attrition rate (-2.3%) (BC Stats 2009).

Assumption: Business attrition rate for Aboriginal tourism reflects provincial performance levels (-2.3%).

6) **TOURISM EMPLOYMENT:**

Sources: *AtBC Business Survey employment data 2006 (FTE / business), 2007-2009: Aboriginal lending institution estimated increases over 2006 business base (Pers. Comm. 2008-2009); 2010 AtBC Business Survey employment data (FTE / business) (Jan 2011)*

Calculation: 2006-2009 Number of businesses x Avg. FTE / business (i.e. 13.22 FT and 2.40 PT positions); 2010 Number of businesses x Avg. FTEs / business (8.4 full-time FTE and 1.85 Part-time positions) / business).

Assumption: Actual FTEs / business in 2010 lower than 2006 due to smaller size of firms.

Appendix 2: AtBC Aboriginal Tourism Operator On-line Questionnaire

AtBC Aboriginal Tourism Operators

Welcome

In its efforts to serve the Aboriginal tourism industry as effectively as possible, AtBC is conducting this survey of businesses. By completing it, you and many other Aboriginal tourism business operators will be helping us develop the programs needed to increase your business's competitiveness.

The survey questions examine your perspectives on your business' progress over the past three years, as well as future prospects. Completion of the survey would take 5-10 minutes.

All your individual answers will be kept strictly confidential, and will only be reported as part of the collective response offered by all business operators.

Please help us by completing this survey by FEBRUARY 4, and return it to us by simply clicking the DONE box at the end of the survey.

Sincerely,
Keith Henry, AtBC CEO

ABORIGINAL
TOURISM ASSOCIATION OF BC
our story. your experience.

About Your Business

* 1. What primary type of tourism business is it? Check all that apply.

- [ ] Accommodation
- [ ] Attraction
- [ ] Retail Services
- [ ] Food & Beverage
- [ ] Events/Conferences
- [ ] Transportation
- [ ] Tours
- [ ] Fishing/Hunting

2. Does your tourism business operate (check one)

- ( ) Year round
- ( ) Seasonally

* 3. If seasonally, which months (check all that apply).

- [ ] January
- [ ] May
- [ ] September
- [ ] February
- [ ] June
- [ ] October
- [ ] March
- [ ] July
- [ ] November
- [ ] April
- [ ] August
- [ ] December

* **4. What year was this tourism business first established? Please enter a 4-number year (no alphabetical characters - correct 1995, not correct 1990s, not correct 95)**

Full-time Employees

How many full-time staff (people working more than 20 hours per week) are typically employed in this tourism business?

* **5. Year Round**

* **6. [Q3]that are Aboriginal / Metis**

* **7. [Q3]During the peak season**

* **8. [Q5]that are Aboriginal / Metis**

Part-time Employees

How many part-time staff (people working LESS than 20 hours per week) are typically employed in this tourism business?

* **9. Year Round**

* **10. [Q9]that are Aboriginal / Metis**

* **11. [Q9]During the peak season**

* **12. [Q11]that are Aboriginal / Metis**

AtBC Programs & Services

AtBC Aboriginal Tourism Operators

13. For each AtBC program, please check whether you have used or plan to use it

	In the past	In the future	Not likely
TrailBlazer - Cultural interpretation/hospitality training	☐	☐	☐
TrailBlazer - Cultural interpretation - Train-the-Trainer training	☐	☐	☐
Tourism business planning training	☐	☐	☐
Marketing programs/services	☐	☐	☐
Aboriginal Cultural Authenticity program	☐	☐	☐

About Past Performance

Over the past three years, to what extent has your business changed:

*** 14. The number of annual days of operation**

◯ Decreased ◯ Remained the same ◯ Increased somewhat ◯ Increased a lot

*** 15. The total number of people that it employs**

◯ Decreased ◯ Remained the same ◯ Increased somewhat ◯ Increased a lot

*** 16. The market competitiveness of its tourism products and services**

◯ Decreased ◯ Remained the same ◯ Increased somewhat ◯ Increased a lot

*** 17. The comprehensiveness of its marketing programs**

◯ Decreased ◯ Remained the same ◯ Increased somewhat ◯ Increased a lot

*** 18. The amount of business revenues it produces**

◯ Decreased ◯ Remained the same ◯ Increased somewhat ◯ Increased a lot

About Future Business

Over the next five years, to what extent do you feel your business will benefit from increased:

*** 19. Global market awareness of Aboriginal tourism in BC**

◯ Not at all ◯ Somewhat ◯ A lot

*** 20. Tourism and customer service training programs for Aboriginal employees**

◯ Not at all ◯ Somewhat ◯ A lot

AtBC Aboriginal Tourism Operators

*** 21. Partnerships with inbound and receptive tour operators**

- ◯ Not at all
- ◯ Somewhat
- ◯ A lot

Future... con't

*** 22. Do you anticipate increasing the number of people employed in your tourism business over the next 5 years?**

- ◯ Decrease a lot
- ◯ Decrease somewhat
- ◯ Not sure
- ◯ Increase somewhat
- ◯ Increase a lot

*** 23. What role (if any) has AtBC played in increasing tourism job opportunities for Aboriginal people in BC?**

- ◯ Not helped at all
- ◯ Not sure
- ◯ Helped a little
- ◯ Helped a lot

Your Business

*** 24. Please share your business name – the results will be kept confidential.**

ABORIGINAL TOURISM ASSOCIATION OF BC
our story. your experience.

Thank you for completing this survey. Your perspectives are greatly appreciated.

The information collected in this survey will now be used to determine the effectiveness of the Aboriginal Tourism Blueprint Strategy, and to improve the services and support offered by AtBC in the future.

QUERIES ON:
AtBC can be directed to: AtBC at www.aboriginalbc.com or 604-921-1070

This survey can be directed to: Beverley O'Neil at oneil@designingnations.com

Please submit your responses by clicking on the DONE box below.