Aboriginal Tourism Association of BC

Evaluation of AtBC’s Tourism Performance 2012-13

Stakeholders Forum
October 7, 2012 - Vancouver, BC
Blueprint Beginning

<table>
<thead>
<tr>
<th>New / Awareness</th>
<th>Existing, Not Market Ready</th>
<th>Market Ready</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
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</table>

No cultural element

Offers an approved cultural experience

Blueprint Future

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BRANDING
Product awareness / understanding
Marketing and Trade Relations

Our Story, Your Experience

Aboriginal Experiences
Kootenay Rockies

Aboriginal Experiences
Vancouver Island

Aboriginal Experiences
Cariboo Chilcotin Coast

www.AboriginalBC.com
Aboriginal Tourism Operator Survey

- gives a snapshot of the Aboriginal tourism operators in B.C.
- provides information on the ability of AtBC to fulfill its mandate, which is critical to funders of AtBC and Aboriginal business funding programs
- provides program / operations direction identifying ways AtBC can better support operators

Please complete distributed handout
Travel Trade Operators Survey

- Currently working or have contact with AtBC
- Identifies where their clients are from
- Level of interest and satisfaction with Aboriginal operators and AtBC
- Intent to continue to work with AtBC

Type of Tour Operator

- Inbound operator: 46.2%
- Outbound operator: 30.8%
- Both: 23.1%
Who are your primary geographic markets / key customers?
INTEREST in actually incorporating BC’s Aboriginal tourism products and/or services into its tour packages:

- Increased a lot: 45.5%
- Increased somewhat: 45.5%
- Remained the same: 9.1%
General Comments from Travel Trade

- Aboriginal tourism product improved
- Product diversity - very attractive
- More inclusion of Aboriginal product... awareness has helped
- Needed - responsiveness to inquiries, improved professionalism, awareness
- Operator pricing policies
- AtBC plays an important role (9/10)
The Global Environment

Dr. Peter Williams
Survey of Republicans and Democrats

- Republicans
  - Stay in US, North America (Canada & Mexico), Caribbean (86%)
  - Likely to extend holidays (11+%)  

- Democrats
  - More international/overseas travel (Europe, Middle East, Latin America) (11%)

- Combined
  - More spending in hotels (+5%)
  - Similar travel concerns
Tourism Influencing Trends

- Rise of Tech-Savvy Mobile Consumers
  - Planning, travelling, consuming, evaluating
  - 2.5 billion ‘mobile’ Asians

- Rise of Customized Trip Search Engines
  - 21 site visits over 3 sessions per trip
  - Growth of personality based trip matching
Tourism Influencing Trends

- Rise of Asian Middle Class
  - 25 million Chinese annually
  - Double digit travel growth
  - $6,200/person/trip
Tourism Influencing Trends

- Rise of Global Crisis Impact Reach
  - Disease, economic, socio-political, natural disaster, war

- Rise of Customized Travel Experiences
  - Convenience > cost
  - Culturally customized services
BC Tourism By Performance

- Gross Domestic Product Performance
  - Overall BC change 2000-2011: +30%
  - Tourism BC Change 2000-2011: +28%
  - Tourism BC Change 2010-2011: -1.2%
BC Tourism By Performance

Tourism Volume Change 2010-2011

- All entries: -3.6%
- US: -3.7%
- Europe: -10.1%
- Asia Pacific: -0.6%
BC Tourism by Performance

- Tourism Business
  - Overall Tourism (2010-2011) +.5%

- Tax Revenues
  - Overall Tourism 2011 +11.3%

- Tourism Employment
  - Overall Change 2000-2011 22.2%
  - Tourism Change 2010-2011 23.7%
2012 Indicators - Summer 2012

- Thumbs Up
  - Canadian overnights up
    - International + 6%
    - US + 5%
    - China + 33%
    - Domestic + 8%
Thumbs Down

- Canadian confidence down - 6.8%
- American confidence down - 2.4%
- European economic downturn
### Estimated Aboriginal Tourist Overnight Visits 2006-2011 (000's)

<table>
<thead>
<tr>
<th>Market</th>
<th>2006</th>
<th>2011</th>
<th>% Change 2006-2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>962</td>
<td>1,981*</td>
<td>1,019</td>
</tr>
<tr>
<td>US</td>
<td>598</td>
<td>875</td>
<td>277</td>
</tr>
<tr>
<td>Other</td>
<td>315</td>
<td>464</td>
<td>149</td>
</tr>
<tr>
<td>Overall</td>
<td>1,875**</td>
<td>3,320**</td>
<td>77%</td>
</tr>
</tbody>
</table>
## Estimated Aboriginal Tourist Expenditures ($ millions), 2006-2011

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2010</th>
<th>2011</th>
<th>% Change 2006-2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>All BC Tourism</td>
<td>7,498</td>
<td>8,047</td>
<td>~8417</td>
<td>7%</td>
</tr>
<tr>
<td>Aboriginal Related BC Tourist *</td>
<td>20</td>
<td>40**</td>
<td>~42</td>
<td>100%</td>
</tr>
</tbody>
</table>
### Estimated Aboriginal Tourism Tax Revenues Generated $ Millions, 2009-2012

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>5.5</td>
<td>5.8</td>
<td>6.1</td>
</tr>
<tr>
<td>Provincial</td>
<td>4.3</td>
<td>4.5</td>
<td>4.7</td>
</tr>
<tr>
<td>Municipal</td>
<td>1.0</td>
<td>1.0</td>
<td>1.1</td>
</tr>
</tbody>
</table>
## Aboriginal Business Development 2006-2009

<table>
<thead>
<tr>
<th>Businesses</th>
<th>2006*</th>
<th>2007/08**</th>
<th>2009</th>
<th>2010</th>
<th>% change 2006-2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>110*</td>
<td>116</td>
<td>131</td>
<td>135**</td>
<td>23%</td>
</tr>
<tr>
<td>Business planning ****</td>
<td></td>
<td>44</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* * *
## Tourism Employment Creation 2006-2009

<table>
<thead>
<tr>
<th>Jobs</th>
<th>2006*</th>
<th>2007</th>
<th>2008</th>
<th>2009**</th>
<th>2010**</th>
<th>%Change 2006-2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time</td>
<td>1,454</td>
<td>1,534</td>
<td>1,679</td>
<td>1,708</td>
<td>1,785</td>
<td>23%</td>
</tr>
<tr>
<td>Part-time</td>
<td>264</td>
<td>278</td>
<td>305</td>
<td>310</td>
<td>345</td>
<td>23%</td>
</tr>
</tbody>
</table>
Thanks Very Much!